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EDC RC 5.56 User Manual

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1 Welcome

1.1 General Introduction

Welcome to DocuData's ***EDC*** software, the complete solution to record management.

The record center version of ***EDC*** software was created to manage the operations of an off-site record center. These operations include management of personnel, locations, customer service, customer access to information and inventory, management of circulation of documents within the record center, and automation of invoicing for services and storage fees.

Summary description of tasks performed by *EDC* :

Record Center Management

- add, search, view, print and edit employees and groups of employees of the record center, including their access rights to the system and their password
- add, search, view, print and edit delivery vehicles of the record center, types of business belonging to the customers, holidays and storage places (buildings)
- search, view, print and edit all the terminology used in ***EDC***
- search, view and print the access log to ***EDC***
- view, print and edit system information, such as picking hours, mask for locations, fields for boxes or files reports, default reports, invoicing taxes, etc
- search, view and print requests to the system, including transmission journal and request statistics
- export or purge all data of a customer out of the system

Customer Management

- add, search, view, print and edit customer information, such as coordinates, invoicing criteria, inventory mask, etc
- add, search, view, print and edit authorized users and user groups for customers
- add, search, print and edit document types for customers, including conservation policies
- add, search, view, print and edit departments and sub-departments for customers, source locations of their documents and restrictions associated to a document type
- add, search, view, print and edit delivery addresses for orders
- add, search, view, print and edit the holidays of your customers

Inventory Management

- search, view, print and edit inventory of boxes and files, including notes and history
- print bar code labels for new boxes and files
- scan documents, manage scanned images and store these images in the electronic vault of the record center
- perform Optical Character Recognition (OCR)
- manage storage locations for boxes, files, open shelf files and media (ex: computer back-up's).
- view and print activity reports for boxes and files, such as overdue memos for boxes and files
- create disposal lists, transfer lists, internal transfer lists or deletion lists (retrieval from the inventory) for documents
- edit internal notes for boxes and files

Orders

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- search, view, create and edit orders for boxes, files, non track files, etc
- create picking lists and refile lists
- create, verify and return deliveries
- search, edit and delete information concerning non track files
- search, create and edit delivery routes
- scan, register and search delivery slips or return slips
- search and consult deleted order items
- manage deliveries and create daily tasks' sheets for employees

Accounting

- bill services and storage
- add, search, view and edit the delivery types and box types used by the record center
- add, search, view and edit the general prices and the customer prices
- add, search, view, print and edit periodic invoice items
- add, search, view, print and edit addresses for department billing
- calculate the total volume in storage or the volume in storage for each customer

A customer version of ***EDC*** called ***ActiveFile*** (formerly EDC Client) is also available; this software allows your customers to manage all of their physical and electronic documents with seamless integration between their file room and your record center. For information, visit our website at www.docudatasoft.com.

1.2 Conventions

Access path

The convention **First item**->**Second item** will be used to represent the route needed to access a command.
If we indicate that to modify a note it is necessary to click on **Box**->**Edit**->**Notes**, this means that the *Box* module must be open and in this module there is a menu *Edit* and the item to be chosen within this menu is *Notes*. **File**->**View Report**->**On Type**->**Department** means that it is necessary to open the *File* menu, select the *View report* menu item, select *On type* and select *Department*. In some cases, the path will be expressed in the following way : **File**->**View report**|**Print report**. This means that there is the possibility to choose from either *View report* or *Print report* from the *File* menu.

Keyboard Shortcuts

Keyboard shortcuts 25 are expressed in the following manner : **Ctrl-X**. They are used as follows.

1. Press on the first key (**Ctrl**) and hold it.
2. Press on the second key (**X**).
3. Release keys.

Terminology

Certain words will often be used when explaining a process. When the word *section* is used in the procedures, it refers to the tab from the main window. When the word *module* is used, it refers to the icon from the main window.

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1.3 How to use this help file

Understanding the structure of this manual will help you to use it more efficiently.

Sections

There are several sections in this manual, each with its own purpose.

- The *Welcome, General Concepts,* and *System Overview* sections serve as a general introduction to the manual and the software. The Changes since last update 37 and Release notes 39 should be reviewed each time you update to a new official release of EDC RC.
- Following that, the *Setting up* 46 section discusses the process of configuring your system for the first time as well as modifying or expanding the services that you offer.
- The Procedures and training manual 102 describes common operating procedures possible with EDC. This serves to introduce concepts in training and can be used in developing your record center's own operations manual, which should be the authoritative reference for procedures in use at your record center
- The Software reference manual 158 systematically describes the main window and each tab, module, field, and menu option within the software. The first topic for each module is typically an overview, followed by a description of the various fields if applicable, then topics detailing the associated menu options and functionality. These chapters and topics are intended for reference, answering questions such as, "What does this field or function do?". Help chapter for a module can be accessed from the module window by pressing "F1".
- An *Appendix* 658 contains useful reference material such as graphics of different workflows, a list of related EDC applications and a list of activity codes that are useful when creating reports.
- The *Glossary* 727 defines terms used in the software

Using keywords

Depending on which type of help file you are consulting, the use of keywords will be different.

Printed version

In the case of the printed version, the *Index* will be the main reference for keywords. The glossary is in alphabetical order and gives a reference page for each term.

Adobe PDF file

In the case of the PDF version, the *Index* will be the main reference for keywords. The search engine particular to *Acrobat Reader* may also be a good way to find the desired topics.

Winhelp

In the case of Winhelp, the *Index* or even the *Find* tab will enable you to look for desired keywords and find their related topics. The *Glossary* will also be available, but the keyword search is often more efficient.

1.4 Quick tour

This quick tour will guide you through a basic navigation exercise using the data and configuration provided with the demo installation. Note that new customers of DocuData receive extensive training and assistance with configuring the software. If your record center is already using *EDC*, we recommend consulting your own specific operations manual, as *EDC* accommodates many different ways running a record center. If you are considering purchasing EDC RC to run your record center, please contact DocuData through our website (www.docudatasoft.com) for a live

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demonstration of the software as used by a major independent record center.

Our objective in this exercise is to find information related to box number 0105, belonging to customer DEMO-D. To do this, we will:

- log in
- navigate within the application
- perform a search

At this point, you have installed the demo CD, and have an active Windows™ session.

Guided Tour

1. Locate the *EDC* icon and double-click on it with the left mouse button.
2. Select a user's name and press **OK**.
3. Enter a password and press **OK**. (For the demo, this is left blank) The *Main window* appears.
4. The *Box module* is located under the *Inventory tab*. With the mouse, click on this tab and on the button of the Box module.
5. If inventory has already been entered, the content of a box is displayed. If not, only the Edit menu is available to add new boxes. We will suppose that at least one box has been entered for the customer DEMO-D. We will look for box number 0105 (or any other box number in the inventory).
6. Click on **Find->Find** or on the Find button (magnifying glass). The search index is set by default to *Customer* + *Box Number*. We will see later how to perform a search 29 with a different search index.
7. A dialog box appears to enter the customer's code. Type DEMO-D then click on the **Accept** button (green check mark).
8. The cursor is on the Number field.
9. Enter 0105 (or any other box number in the inventory).
10. Press **Ctrl-Enter** or click on the **Accept** button to start the search. The computer initiates the search and displays the most similar item found.
11. It is now possible to consult all the wanted information and to display or print a report through the **File** menu. For now, we are finished and we will leave the module.
12. Click on **File->Exit** to return to the *Main window*.

Note : Every menu item has an underlined letter for direct access without using the arrows or the mouse. A menu can be activated by pressing simultaneously **Alt** key and the underlined letter. For example, to activate the File menu simply press **Alt-F**.

Inside this menu, menu items and sub-menu items also have underlined letters. When pressing these letters without Alt it is possible to activate the action. Then to exit the module and go back to the Main window simply press Ctrl+Bksp.

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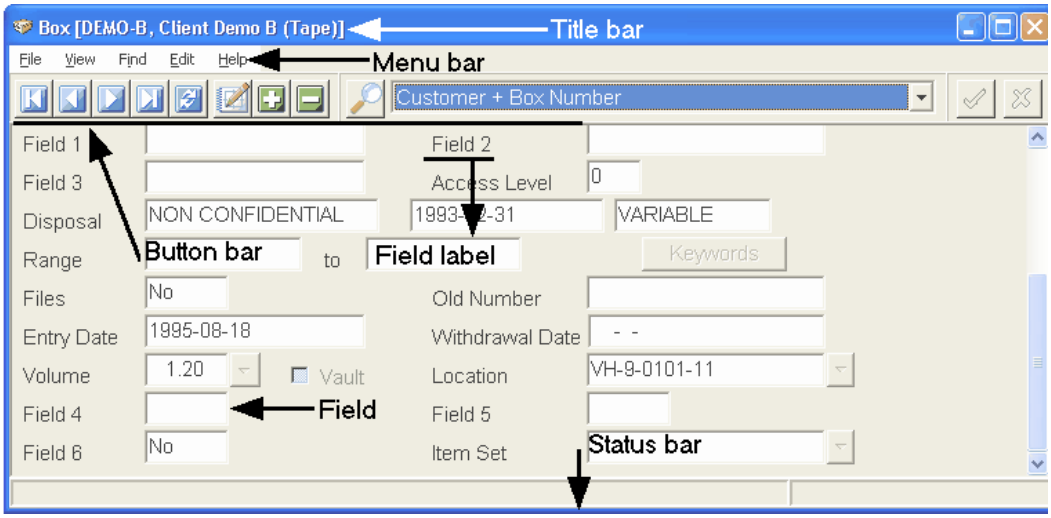
2 General Concepts

2.1 Elements of a typical window



Title bar
The title bar indicates the name of the window. Every module appears in its own window. The title bar of the main window displays which employee is logged in.

Menu bar
The menu bar allows to activate the software's operations. Every word represents a menu. A menu gives access to various menu or submenu items and appears in drop-down lists.

Button bar
Buttons provide rapid access to certain functions. Simply click on a button to start its action.

Status bar
The status bar displays relevant information for the current operation.

Field label
The fields are usually preceded on the left by a label describing their content.

Field
A field is a location on an entry form which displays specific information. Some fields may be modified, others are only displayed for consultation. A field is generally preceded by a label except when its content gives no possible doubt.

2.2 How to use the menus

There are three ways to use menus : navigate with the mouse, use shortcut keys or press the *Alt* key.

Mouse
The easiest way to navigate is to use the left mouse button to select a menu and then choose a menu item from the drop-down list that appears

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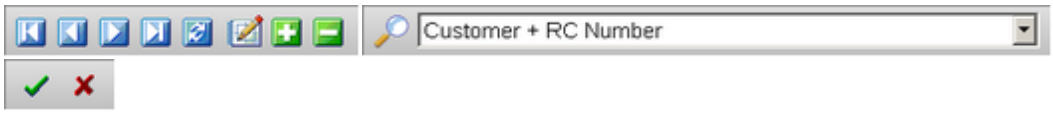
Shortcut keys
Once you are familiar with the software, the fastest way to access common functions is using keyboard shortcuts. In exploring module menus, to the right of the menu items you will notice that some options have shortcuts listed. For example, on the *Find* menu you will notice Ctrl-S written to the right of the *Scroll* menu item. This indicates that holding **Ctrl** and pressing **S** from within this module is equivalent to using the mouse to select this function from the menu.

"Alt" key
Before using the third way, notice that every menu or menu item has an underlined letter. For example the *F* from the *Find* menu is underlined. Pressing *Alt* then *F* (noted as *Alt-F*) on the keyboard will open the *Find* menu. From within a menu, menu items again have underlined letters. Pressing the letter will activate the menu item.

2.3 Button bar

The button bar allows you to navigate between records and add or delete. Navigation buttons are colored and active in browse mode but but grey and inactive while in edit mode.



Button	Action	Corresponding Shortcut
First	Go to the first record.	Home
Previous	Go to the previous record.	Page Down
Next	Go to the next record.	Page Up
Last	Go to the last record.	End
Refresh	Refresh the current record's information.	Ctrl-R
Edit	Modify the current record.	Ctrl-E
Add	Add a record.	Ins
Delete	Erase the current record.	
Find	Search for a record.	Ctrl-F
Box Number **Search Index**	Choose a search index.	Ctrl-K
Accept	Accept an action.	Ctrl-Enter
Cancel	Cancel an action.	Esc

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2.4 Navigation shortcuts

The following standard navigation shortcuts allow you to move efficiently through EDC using the keyboard.

Up-Arrow	Go to the previous line
Down-Arrow	Go to the next line
Left-Arrow	Scroll to the left
Right-Arrow	Scroll to the right
Shift-Tab	Move to the previous control or field
Tab	Move to the next control or field
Page up	Scroll one page up
Page down	Scroll one page down

In an entry form

Shift-Tab	Go to the previous field
Tab	Go to the next field
Home	Go to the first record In an edition mode, it moves the cursor to the beginning of the field
End	Go to the last record In an edition mode, it moves the cursor to the end of the field
Page up	Go to the next record
Page down	Go to the previous record

2.5 Common keyboard shortcuts

The following shortcuts allow you to activate menu functions using the keyboard.

Alt-F4	Exit the program or the module
Ctrl-Bksp	Return to the *Main window*
Ctrl-E	Edit displayed information. The menu will not be available during editing. Changes can be accepted with **Ctrl-Enter** or cancelled with **Esc**
Ctrl-Enter	Accept the information of an entry form
Ctrl-F	Find information
Ctrl-K	View and change the search index
Ctrl-N	Edit notes
Ctrl-S	Scroll
Ctrl-R	Refresh
Shift-F7	Select the printer and its options
F1	Contextual help
F3	View history
F8	Search with bar codes
F9	Quick Find
Del	Delete an item
Enter	Terminate selection. The choice corresponds to the selected information. In an edit mode, it is the same action as **Tab**
Esc	Cancel a selection, close a menu or close a submenu
Ins	Add item
Space	Mark the highlighted item in multiple selection lists. This key is efficient only for

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multiple selection choices (when entering a box order for example)

In BOX module

F7	Print thermal labels (also in other modules)
Ctrl-N	Adding notes
F5	Editing the alternate label
F2	View files within a box
F3	View the history
F4	View the notes
F6	View the last order

In FILE module

Ctrl-I	Open the imaging module
F3	View the history
F4	View the notes
F6	View the last order

In DISPOSAL | TRANSFER | DELETION list modules

F2	View items within a list

***In ORDERS**

F4	Add a box sale
F11	Box search
F12	File search
Alt-F6	Import returns from a text file
Alt-F7	Import returns from a memo
Alt-F8	Import an item from a text file
Alt-F9	Import an item from a memo
Alt-F10	View ordering notes

In DELIVERY module

F7	Print recipient labels

Note that shortcuts are listed beside the corresponding menu items in each module

2.6 Logging on to EDC RC

It is important for users to log into EDC RC with the correct credentials when they use the system and to log off when they are done. Logging off prevents unauthorized access and permits others to log in. Logging in correctly ensures that employees have access to the functionality and information necessary to perform their function, and permits accurate tracking of who performed each operation.

1. If a login window is not already present, double-click the box and file shortcut to activate **Docu32.exe**. A window will appear.

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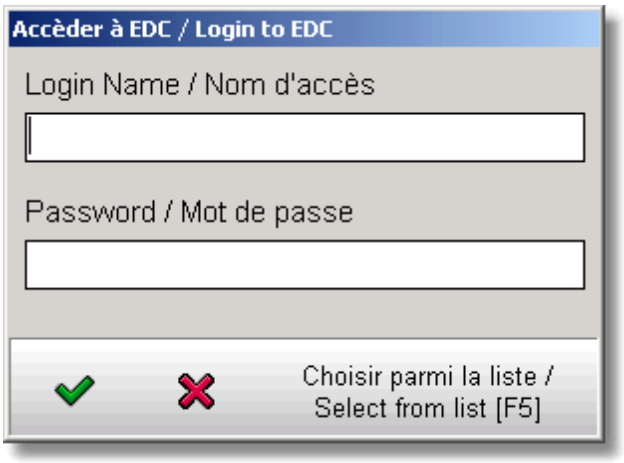
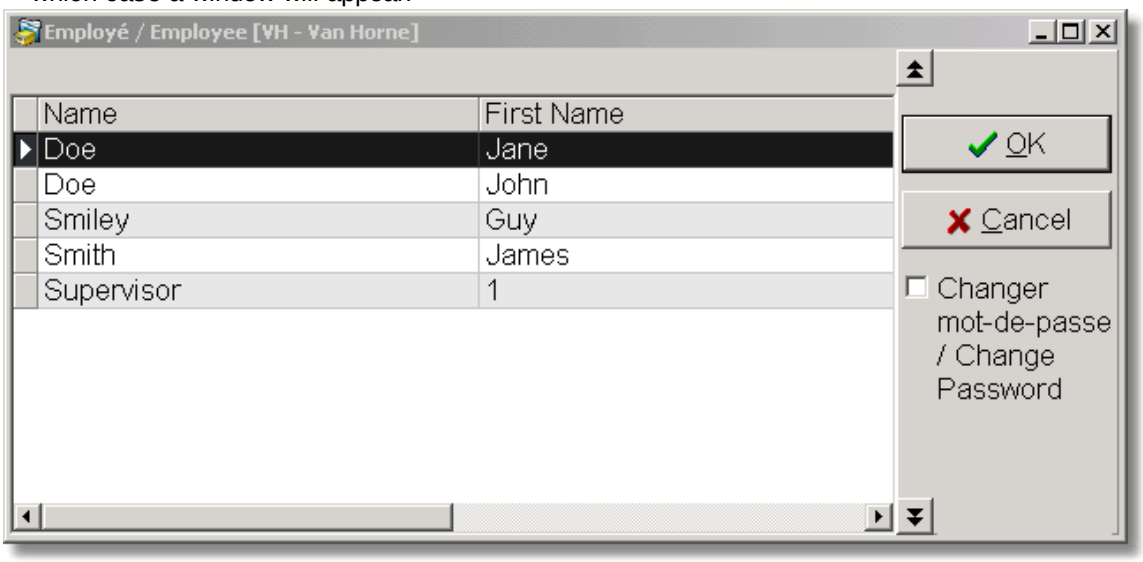
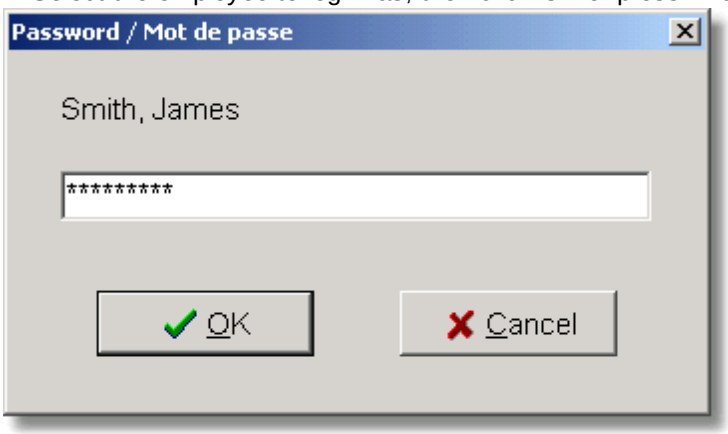


2. Type the login name and password and press enter, or press the **F5** key to select from a list, in which case a window will appear.



3. If you wish to change your password, check the *Change Password* box.
4. Select the employee to log in as, then click **OK** or press **Enter**. A window will appear



5. Enter the password, then click **OK** or press **Enter**. If the password is correct, you will arrive at the *Main Window* of EDC RC.

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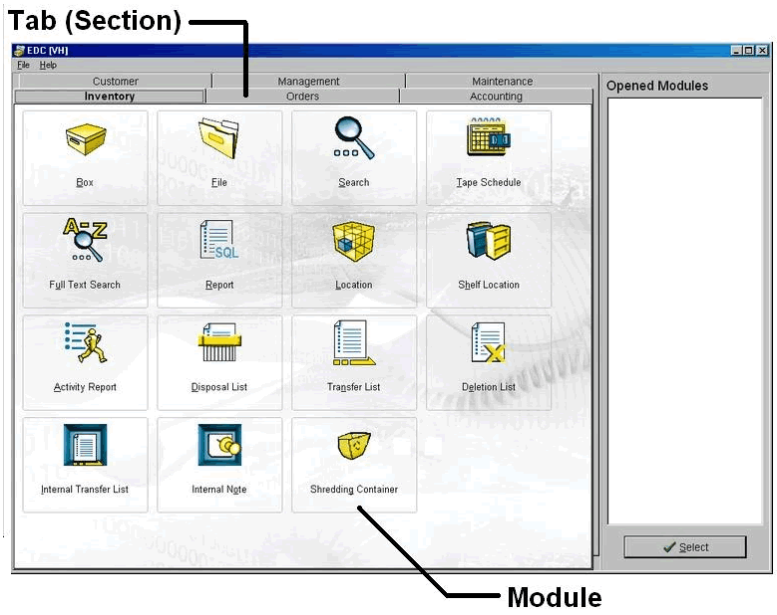
Note:
Entering 10 incorrect passwords for a user within 10 minutes will cause an employee's profile to be made inactive until reset in the *Employee* 170 module by changing the end date.

2.7 Opening a module

The *Main Window* provides access to the modules which make up *EDC*. To the left, the available modules are arranged on 6 tabs. To the right is a list of opened modules. It is possible to have several modules open at the same time, including multiple windows of the same module. (For example, you could have one box module window open to perform data entry, and open another box module window to a different box to look for information).



To open a new module from the main window:

1. Select the appropriated tab by clicking on it with the left mouse button.
2. Click on the desired module.

To return to the main window from a module without closing it:

1. Press **Ctrl-Bksp**

OR

1. Click on the right mouse button.
2. From the pop-up menu, select EDC.

To return to a previously opened module from the main window:

1. In the "*Opened Modules*" pane on the right, select the previously opened module that you wish to return to.
2. Double-click it, or click the **Select** button

To open a commonly used module from within a module:

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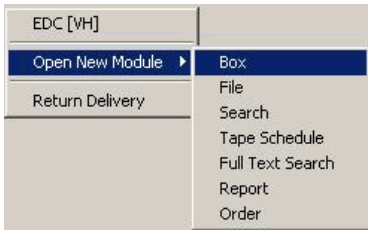
1. From within a module (in this case, Return Delivery was used), click on the right mouse button. Some menus appear.



2. Select **Open New Module->Box** (for example)

To return to a previously opened module from with a module:

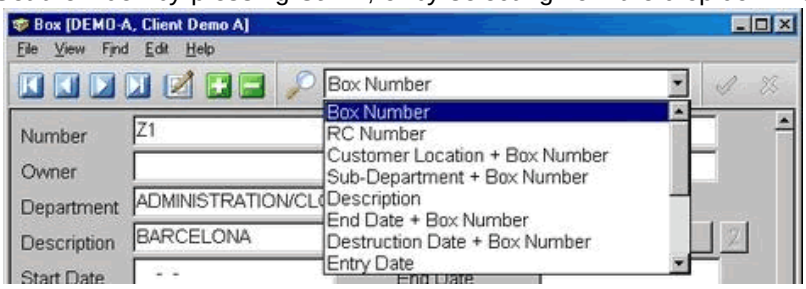
1. From within a module, right-click to bring up a pop-up menu.
2. From the bottom section of the menu, select the desired module from the list of open modules.

2.8 Performing a search

A module may have several indexes available. Selecting the index will determine the order in which records appear while browsing, scrolling, and searching.

To set the index:

1. Set the index by pressing **Ctrl-K**, or by selecting from the drop-down list as illustrated below.



To perform the search:

1. Initiate the find operation by using the **Find button** (magnifying glass), or by clicking on **Find->Find** or pressing **Ctrl-F** keys.
2. Depending on which index was selected, a dialog box may appear, or the cursor may be positioned to the first field of the index. Enter the search information.
3. Once all search information has been entered, click the **Accept** button, or press **Enter** from the dialog box or **Ctrl-Enter** from the module window.

2.9 Viewing and printing module reports

Most modules have their reports available from the *File* menu. All reports may either be printed directly, or viewed on screen (with the option of printing).

The **File**->**Print Setup** operation may be used to select the target printer and the paper source. The other printer settings are optimized by the software and cannot be modified. If no specific printer is selected before an action, the program uses the Windows default printer.

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When a report is displayed, click on the **Print setup** button to set the printer settings or click on the **Print** button to print the report.

Note : The zoom option only affects the display, and not the printed copy.

Related topics

- The Activity report 394 module enables you to view reports of boxes and files based on their history of activity
- You can also download additional reports from DocuData and create your own through the Inventory->Report 364 module

2.10 Using lists

Scroll lists provide a convenient method of browsing records in a module. They display key information from multiple consecutive records at once, ordered by the search index 363.

To navigate using a module scroll list:

1. Set the search index by pressing **Ctrl-K** or Clicking the search index drop-down box, then selecting the desired index.
2. From the menu, select **Find->Scroll**, or press **Ctrl-S**
3. Navigate through the list using **Page Up** / **Page Down**, the up and down arrows, or the mouse.
4. When the desired record is highlighted, press **Enter** to open the module to this record.

Selecting items using a multiple selection list

Lists that are used for selecting items behave similarly. If it is possible to select multiple items, selected items are highlighted in black. Double-click or press the space bar to toggle items between the selected and unselected states. The list cursor appears as a triangle beside a record to the left of the list.

2.11 Editing the information of an entry form

When a module is opened, it is displayed in the "browse" mode by default. This means that the information may be viewed but cannot be accidentally modified. To be able to modify a record it is necessary to enter "edit" mode, by clicking the **Edit button** on the button bar, selecting an option from the **Edit menu**, or pressing **CTRL-E** on the keyboard.

While editing an entry form, the menu bar is inactive until the data entry operation is completed. It is possible to navigate in the entry form by clicking on **Tab** and **Shift-Tab** keys or using the mouse.

To accept the modifications in an entry form press **Ctrl-Enter** keys or click on the **Accept** button. To cancel the modifications press the **Esc** key or click on the **Cancel** button.

2.12 Field types

There are three main types of data entry fields : alphanumeric or numeric fields, choice fields and drop-down fields.

Alphanumeric or numeric fields

The most common fields of all. Simply type the required information in the field. A numeric field can

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contain only numbers, while an alphanumeric field may contain both numbers and letters.

Choice fields
Only a limited set of choices may be entered in the field. Press the space bar or one of the arrows next to the field to select the next possible value.

Drop-down fields
These fields are like numeric and alphanumeric fields, but only values located in the list may be entered in these fields. If the information entered in the field is not on the list, then a selection list is displayed (starting with the entered character) to select the value. The list is accessible by clicking on the button located to the right of the field (see the icon above).

2.13 Exiting a module or the software

Exiting a module

In any module, press **Alt-F4**, click **File->Exit**, or click the 'x' in the upper right corner of the window to exit. Note that you will be asked to either **Accept** or **Cancel** changes before exiting if you are in *Edit* mode.

Exiting the software

To exit *EDC RC*, click on **File->Exit** or press **Alt-F4** from the *Main window*.

If several modules are opened, a dialog box will inquire whether you wish to close all modules. A message will appear if one or more of these modules is in edit mode.

3 System Overview

3.1 Outline (System Overview)

The configuration of your EDC RC system should mirror how your record center operates. The topics in this chapter provide an overview of how and why EDC is organized, to provide some structure in this configuration process.

3.2 General concepts of off-site record management

General

The goal of an off-site record center is to efficiently manage the documents of its customers while allowing them excellent access and control. Off-site record centers enable customers to use their higher cost office space more efficiently by keeping their most active documents in internal storage and sending less commonly used 'semi-active' records to lower cost off-site storage.

For an efficient management of off-site records, a solid management is required to provide a complete control over the inventory, both for the off-site record center or its customers. One of the things that guaranties the efficiency of the Record center is an Internet link between the off-site record center and its customers that are using the EDC software (client version or web version). It automatically updates the inventory and assures a very efficient ordering system in which the state of every box and file is accurately available at any moment.

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A variety of *delivery* options allow customers to balance urgency and economy in accessing their offsite records.

The *billing* procedures for off-site record storage can be complex since there may be many different types of services involved. The inventory for a customer may fluctuate throughout the month as boxes are added and destroyed. Furthermore the costs may have to be redistributed on a departmental or on a charge back level. Relating charges closely to the services provided leads to a billing model that customers recognize as fair.

Due to the variety of tasks related to record management, not all users of the system have the same responsibility. Some users may be responsible for maintenance of inventory only; others may have access to billing information to control costs; some users may only be assigned to certain departments. The record management system must control the access to the information.

Inventory

Inventory control is at the core of all record management systems. It must be possible to determine the position and state of all documents at any given time. You should be able to view the history of the box, and identify specific boxes using the related details , etc.

In order to track boxes and files accurately, each item is labeled with a bar code 727; this bar code is scanned with a bar code reader or a PDT 104 every time an item is delivered and returned to the off-site center.

To maintain the inventory of every box or file, the activity of each item is tracked individually in the history. For example: in-box files that are not listed in the inventory may still be ordered as non track files; because of that, they are still controlled in a limited fashion.

In order to answer to these specific needs, the EDC software allows the addition of boxes and files to the inventory in a simple and direct manner. It then automatically prints bar code labels for each document added (certain conditions apply).

Removal of boxes from the inventory can also be necessary for various reasons. In that case, the system allows the creation of disposal lists. After approval, the boxes will be treated according to the disposal mode (destruction, transfer, deletion, etc). Disposal lists can also be created manually, one item at a time. Boxes may be removed from inventory if they are transferred to another storage facility or if they are simply not returned to the center after having been ordered. Same thing for a semi-active box or file that needs to be reactivated after being removed from the inventory. In that situation, the system allows the recovery of the history before the removal.

For archiving purpose, the disposal dates can either be specified as a fixed date or calculated on a document type or departmental basis depending on the conservation policy 727 of each customer.

Orders and deliveries

The ordering system allows the retrieval of boxes and files from the off-site record center. Orders may be delivered to the customers according to their different preferences and priorities.

If the option to group orders 225 is turned on, orders for the same delivery cycle and delivery address with compatible delivery types will be grouped onto the same delivery, saving labor and transport costs. This encourages customers to place orders as the need for items arises.

Billing

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Generally the operating costs of an off-site record center contain at least the following categories : storing, labor and transport.

Storing costs are calculated in cubic feet per day, according to addition or retrieval of boxes. Labor costs are based on the length of time the boxes and files have been manipulated; transport costs are calculated according to delivery items. In order to keep control on transport costs, the EDC software allows to verify each delivery at anytime.

Users

Record center employees using EDC RC require user profiles and passwords for logging in. Profiles are used for tracking purposes and also to configure each employee's access to match their responsibilities. Access rights are typically assigned by assigning an employee to "Groups" that have been configured with the rights for performing a role.

Similarly, your customers will have authorized users with profiles that determine what records, delivery addresses, delivery types, and functionality each user has access to. They too can have user groups that match their roles.

3.3 States associated with circulation of documents

Here is a description of the different states documents can have during their circulation (see the schematic representation below) :

PRE ADD
The item has been entered in the computer's inventory but has not been received at the off-site record center. No rent charges are applied for items in PRE ADD, and these are easily removed from the system.

Once the items arrive at the off-site center, their state is changed to IN and rent charges begin to take effect. A history of all boxes that have been in the record center is kept in the system .

IN
The item is at the off-site record center and is available for ordering.

SELECTED
The item is currently selected for an order but has not yet been shipped.

OUT
The item has been ordered from the off-site record center and has not been returned. These boxes are considered part of the record center's inventory, and storage costs typically apply until they are removed from inventory through destruction, transfer, or deletion.

ON DESTRUCTION
The item is on a destruction list at the off-site record center. After destruction of the item, its state will change to DESTROYED.

ON TRANSFER
The item is on a transfer list. After the transfer, its state will change to TRANSFERRED.

ON DELETION
The item is on a deletion list (cancellation of space). After the item is processed, its state will

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change to DELETED.

DESTROYED
The item has been destroyed at the off-site record center. Storage fees are no longer applied.

TRANSFERRED
The item has been transferred to another storage center, or to another customer within the same record center. Storage fees are no longer applied.

DELETED
The item has been deleted, which implies that the space for the item at the off-site record center is cancelled and will not be billed for. Boxes are generally deleted because they will not be returning to the off-site center. Storage fees are no longer applied. If the item is returned on a delivery, it will be returned to the IN state, and charges will once again apply.

Note:
When boxes are deleted from inventory, their records not removed but are simply marked as DELETED in the system. It is therefore possible to reactivate, them in the event that a customer returns items that they had marked as permanently out.

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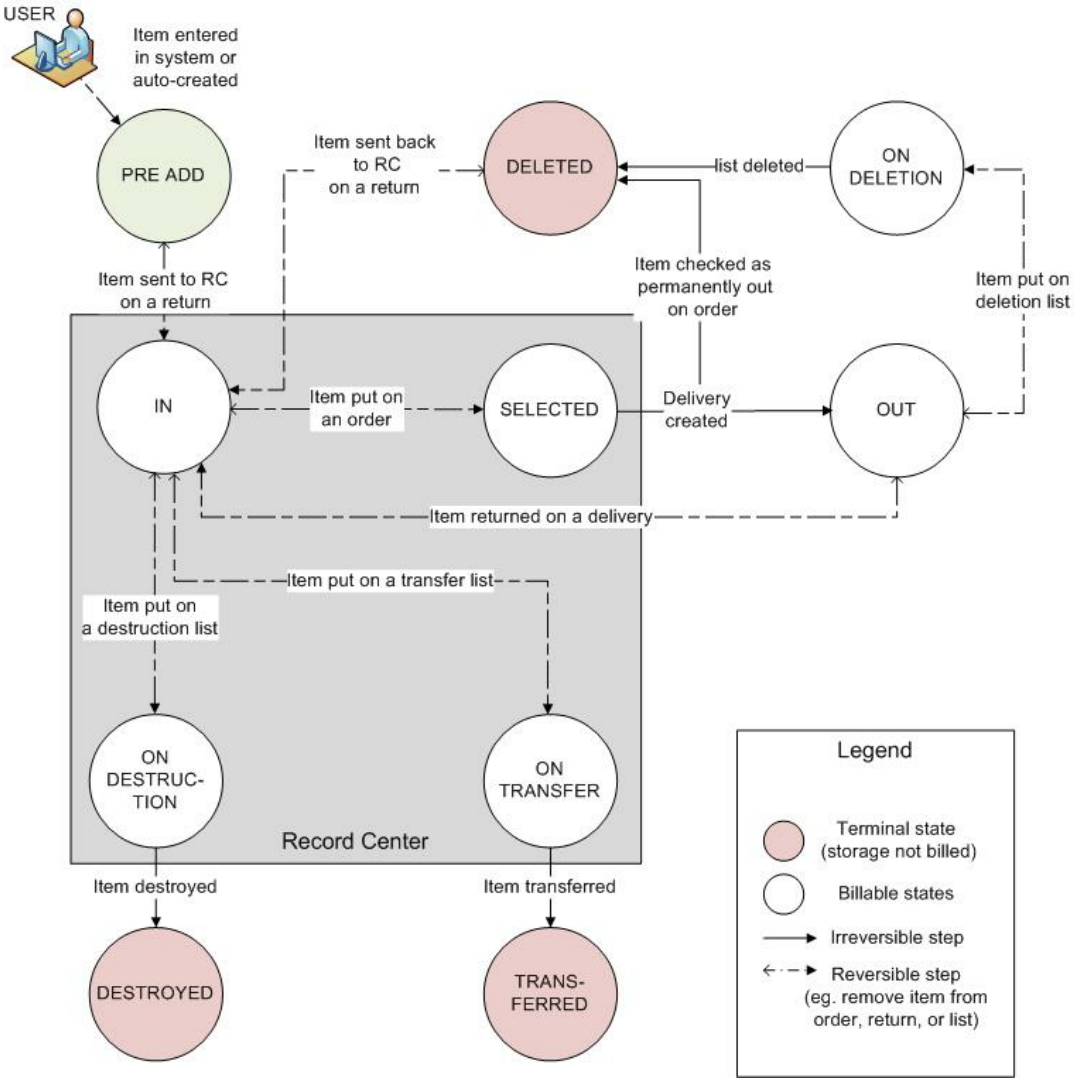

3.4 Integrity Verification

The ***EDC RC*** software promotes a systematic work flow designed to catch any errors or omissions as soon as possible. If an item is forgotten in one of the steps, the error will be caught in the next step. This logic of checks and balances is especially visible when delivering and returning items.

Picking: An item will remain on the electronic picking list until its barcode is scanned or it is excluded (by pressing 2 for Next, 3 for not found, then entering the reason). If the picking list contains only boxes (not files) then they may be scanned in any order. However, the PDT only returns to the main menu once all items have been picked. Scanning an item that is not on the list produces a beep and error message, and the picker must clear this message before scanning the next items.

When the list is uploaded to the software, a report of any items not picked is printed, including items that were excluded and any items remaining on the list if picking was not completed. Items skipped during picking with the PDT are returned to the "to be picked" state.

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The treatment of items marked as "excluded" while picking on the PDT depends on the value of the Double Pick 237 option in customer information.

- With the option set to *Yes*, the first time the item is excluded on the PDT it will be returned to the picking list. If it is excluded a second time it will be marked as excluded in the system.
- With the option set to *No*, items will be excluded in the system the first time that they are excluded from the picking list on the PDT.

Typically, record centers chose not to use the double-pick option. Instead, when a file is not found the employee will "skip" the item on the PDT and bring the box back to an area where the lighting is better, for someone else to search. If a file is not found, people will commonly exclude the item using the manual picking 531 process directly on the computer, with the aid of the order number and item number found on the file picking label.

Delivery Creation: Delivery creation groups the existing orders for the specified delivery cycle into deliveries. Because ordered items may be excluded, deliveries will only become closed if all items on it have been either successfully picked or excluded. If EDC is still awaiting picking results for a delivery, EDC provides a warning and the delivery slip for that delivery is not printed. Complete the picking, then repeat delivery creation.

Items for delivery are typically sorted manually by "customer key" following delivery creation, so that they can be more easily match to the correct delivery.

Delivery Routes: (Optional): Delivery routes allow you to provide drivers with an ordered list of the deliveries that they are to perform. It is possible to print the delivery slips in order from this module, and also to download all of the deliveries for truck validation, and then for delivery with PDT, in single operations.

Truck Validation: (optional by customer) Truck validation may be performed through the Delivery 536 module (for individual deliveries), but is typically performed through the Delivery Route 546 module. This may be done on the truck or in an area designated for loading onto that truck - ensuring that nothing is forgotten.

Truck validation uses the PDT to validate that all the correct items boxes and files are present. If an incorrect item is scanned, the PDT beeps and warns "Item not in list". This protects against errors in picking, sorting, and loading the vehicles. Truck validation applies to delivery types that use record center courier 623.

Delivery with PDT: (optional by customer) After downloading the deliveries to the PDT, drivers may scan the items to be dropped off with PDT. Again, incorrect items will be identified as "not in list". If an item is omitted, the PDT will prompt them to scan it or manually confirm that they are unable to deliver it. (See the Integrity verification workflow: Box delivery 661 for a flowchart). Delivery with PDT also enables drivers to confirm that the correct items have been picked up, if the customer has identified specific items for return.

Return Delivery: When return deliveries are uploaded from the PDT, a list of any undelivered or unreturned items (if specific items were to be returned) is produced.

Items are then typically scanned to a holding location to sort boxes by size for re-shelving. If an item was not scanned on the return, it will be caught at this step. Files are scanned to file transit locations.

When items are re-shelved or re-filed, they go to the *verified* state. Any items that were missed will appear on the *not verified items* report which should be reviewed daily. Additionally, viewing the

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items in a holding location that has been emptied will show items that were not scanned.

Reconcile process errors: Many common processing errors (such as moving a box into the wrong size of location) are logged in the process errors report. Within the **Orders->Delivery Maintenance** module, the File->Reconcile process errors 576 menu option allows you to review any such errors and confirm that they have been fixed. Correcting errors soon after they occur and reconciling any process errors at the end of each shift provides an overall mechanism for ensuring process and inventory integrity.

Reviewing this report can also be useful in deciding whether certain practices should be reviewed or further training may be required.

3.5 Changes since last update

5.50

8813 Add ability to login in ActiveWeb using email address in addition to login name
8816 Add ability to have read-only box and file numbers when using automatic numbers
8913 Add option to allow disabling the "Box Sale" menu item from the order module in EDC RC and in ActiveWeb.
8923 Add specific days only options to regular delivery types
8919 In the Scroll list of the Delivery module the Building code should be included
8920 In the Scroll list of the Return Delivery module the Building code should be included.
8898 Allow once a day delivery cycle with same day delivery
8824 Add the ability to charge a Trip charge price code for a delivery address
8966 Remove carriage returns/line feeds automatically in box/file description fields
8963 Add a customer option to always hide the alternate label field in ActiveWeb.
8974 Add a function to "Associate to multiple customers" the Box and File field definitions.
8896 Add interface to be able to mark process errors as corrected
9001 Add the Box userfield1 to the ActiveWeb order confirmation for boxes and files.
9002 Add the Box userfield1 to the delivery slips and return slips.
9009 Add the Box userfield1 to the ActiveWeb order confirmation for auto inventoried files.
5208 Ability to view and terminate ActiveWeb/ActiveWeb sessions
8850 Add filter to include customers with web licenses in customer search form
9045 Add ability to display the alternate locations on the PDT

5.51

8912 Add the ability to apply a file accession price for files in box.
8812 Add ability to apply the tax based on the billing building that the client belongs to.
8811 Add ability to have global, customer and individual invoice notes.
8809 Add ability to search by business type in the customer search form
8899 Add accounting key by departmental invoice when exporting invoice data
8926 Abitlity to enter a class for export to Quickbooks at the customer level.
8950 When adding new customers using "copy and add", the copy options should be remembered
8999 Allow adding orders with only returns and line items as pick and run
9017 Allow searching by alternate location in the Location module.
8559 Add sub-department filter to advanced search in ActiveWeb / ActiveWeb
8843 Add a user level option to view or hide view box / file history in item detailed report.

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8766 Accept DELETED items that are returned to the record center
8586 Add 'Edit Chargeback' to ActiveWeb
8693 ActiveWeb: Add a Start Date range filter in the Advanced search options.

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8990 When deploying ActiveWeb, EDC should not revert back to the standard help files similar to what is done with images.
8994 Include the building and delivery date on the "Items not delivered" report from the Delivery maintenance module.
9065 For Invoices sent by e-mail, add a system-wide BCC e-mail address and an reply to address.
9070 Add user option "Don't ask for password at RC"
9102 Allow users to create a deletion list from out items on the work list
8815 Add ability to indicate the capacity on location barcodes.
8881 Add customer option to automatically produce a list of authorized users when sending invoices.
8956 Delivery with PDT should not be required for EXTERNAL delivery types.
9011 Add a customer option to remove the "quantity shipped" and "quantity returned" from the return slip and the delivery slip
8546 Add option to specify delivery type for destruction and perm-out billing and box schedule orders.
8955 Improve workflow for Fax deliveries to use Imaging on demand module
8972 When placing items on an order using the box or file search it should be possible to indicate the items as perm outs.
9073 Filter itemized return items on delivery return e-mails sent to authorized users.
9080 Allow importing customer order notes.
9091 Add a customer option for disposal mode integrity.
9097 Put currency symbol before values in detailed invoice and delivery summary
9100 The Create By-Pallet List from the Disposal and Transfer modules should indicate the quantity on the list.
9101 Correct the behaviour of the Once a day cut-off when using a by date delivery type.
9089 Add "automatic" container billing option
9109 Modify web license to included a "base" license with limited features
9116 Allow specifying return price code for item and container courier billing in delivery type
352 Allow deleting images after they are saved
9117 Add ability to automatically charge web access fee
9104 Add import option "replace notes instead of appending"
9124 Add customer option, Data capture before accession
9125 Prevent setting the vault flag to false for tape only customers
9137 Add option to hide invoice lines with zero cost
8780 Indicate number of active and withdrawn files when display files in box in ActiveWeb/ ActiveWeb
9107 Implement file to search for existing inventoried files when not found
9110 Allow users to import data from the web
9168 Add pallet verification errors to process errors for reconciliation
9203 Add deletion list number on special instructions of order created for billing
9223 Add ability to resize an IN box with a "special" move list
9262 Don't send multiple order confirmation email to delivery supervisor

5.53
9283 Add history item for resizing of boxes
9295 Warning when reprinting alternate label for a tape
9314 Fix error with invoicing new file in box accessions by department and item type courier billing

5.54
9051 Allow entering charge back code when adding items from list to an order
9112 Add details to "Is this delivery complete?" confirmation dialogue.

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9153 Customizable minimum password length by customer
9167 Add automatic way to remove document separator page that was not decoded
9176 Printing of delivery slips in order of delivery route
9186 Add column totals in location not full report
9204 Add fax number field to authorized users module
9205 Include box | file fields 2 and 3 in web search
9251 Add ability to export user rights report in CSV format
9270 Show order number for each item on paper pick list
9349 Show user fax number on delivery slip
9350 In order module display and allow editing "perm out" request after item is added to order
9352 Create a report to list the recurring orders schedules for a customer.
9353 Add ability to add an "out to" field when importing boxes and files
9354 Add option to skip vault validation during import (*SkipVaultValidation)
9377 Identify the user logged in, in the title bar of EDC RC and ActiveFile
9379 Order item report in ActiveWeb does not display AM/PM properly
9384 Date mask in tape schedule doesn't match system info mask
9391 Use local currency format on invoice
9399 Compute destruction credits based on box withdrawal dates instead of the destruction list
9131 Add the ability to specify the number of files-tapes to pickup from the customer
9437 Prevent doing a destruction if a client is locked
2770 Create Highwater storage billing option
9531 Log ActiveWeb sessions in access log table

5.55
9322 Fix move up/down in delivery route module
9395 When importing PDF in
(box and file maintenance) ask the user what color format to import in
9450 Create stored procedures to get notes and barcodes in reports
9462 Modify Quickbooks export to make items taxable
9466 Specify the return quantity by box, file and tape in the delivery route module
9468 Add information on authorized users CSV export
9469 Specify the return quantity by box, file and tape in the Recurring orders module
9470 Add methods to edit recipients and edit PermOut options for an order
9484 Add ability to apply a negative global rate increase in Customer Pricing.
9191 Add customer option for end of rotation delivery slip reminder
9256 Allow "non-pickable" order items, and have such orders, group, close, and verify automatically
9490 Add ability to save query timeout settings per report
9534 Allow billing for EDM storage
9538 Do not apply the trip charge and the gas surcharge prices when all items on a delivery are excluded.
9576 Make font for special instructions on delivery slip bold

3.6 Release notes

5.50
8813 Add ability to login in ActiveWeb using email address 276 in addition to login name.

This feature does not require any additional configuration, and is useful for users that log in less frequently and have difficulty keeping track of many logins and passwords.
Simply notify your customers that they may use the e-mail address associated with their profile

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instead of their login if they wish. Note that if multiple profiles for the same account use the same e-mail address, this feature will only work for the first profile.

8816 Add ability to have read-only box and file numbers 236 when using automatic numbers

Activate this setting in the customer information module if the box number should always match the RC number for this customer. This is an enhancement to the recently-added *Automatic Box and File number* options, which save time if your customers do not use their own box and file numbering systems.

8913 Add option to allow disabling the "Box Sale" 238 menu item from the order module in EDC RC and in ActiveWeb.

By default, the standard box sale price code (1.2) is available on the orders tab in EDC RC and in RC web through two paths - both as a line-item, and also as a special "box sale". However, if you offer multiple types of boxes for sale, you may not wish to have your customers use this second option. In this case, use the "Hide Box Sale" setting in customer information. (Note: if you have many customers and wish to update this setting for all customers, you may contact support@docudatasoft.com to do the change in one step rather than editing each customer individually.)

8923 Add specific days only options 624 to regular delivery types.

Use this feature to create new regular delivery types that will be limited to specific weekdays - for example, if you only do a specific route on Tuesdays, you could make a delivery type for this available to the customers on that route, and any regular orders with this delivery type will automatically be scheduled for the next available Tuesday.

8898 Allow once a day delivery cycle with same day delivery 203

This feature is primarily of interest to new record centers during their initial set-up. If you are reconfiguring your picking and delivery times and think that this feature might be of use to you, please contact support@docudatasoft.com to help you thoroughly analyse the impact of proposed changes.

8824 Add the ability to charge a Trip charge price code for a delivery address 301

If a trip charge is added to a delivery address, this charge will be added to regular delivery charges once for each delivery to this address where the ship mode of the delivery type is record center. (i. e, not fax, imaging, or external courier).

8963 Add a customer option to always hide the alternate label 238 field in ActiveWeb.
8974 Add a function to "Associate to multiple customers" the Box and File field definitions 261 .

This feature simplifies the process of setting up an existing customer to use ActiveWeb based on previously configured customers.

8896 Add interface to be able to mark process errors as corrected

There is now a friendly interface for helping you to ensure that all process error are taken care of. Use of this interface should be included as part of daily operations. See Reconciling process errors 576

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9001 Add the Box userfield1 to the ActiveWeb order confirmation for boxes and files.
9002 Add the Box userfield1 to the delivery slips and return slips.
9009 Add the Box userfield1 to the ActiveWeb order confirmation for auto inventoried files.

5208 Ability to view and terminate ActiveWeb/ActiveWeb sessions

It is now easy to view a list of active web sessions, and if necessary, terminate them. This is very useful if you wish to perform maintenance during the day and do not want to affect any customers, and is also useful if a customer has users that are unable to access the web because all of their licenses are in use. To manage active web sessions 168 the Web RPC server setting 202 must be completed in the system information module.

8850 Add filter to include customers with web licenses in the customer search form 354

The customer search form is used in operations such as generating mailing lists or applying rate increases. Now you have the option of easily identifying customers with web licenses.

9045 Add ability to display the alternate locations on the PDT 106

This feature is very useful if you are converting from one location addressing scheme to another. On the PDT, simply go into the (4-Utilities) menu and press 5 to access the option to toggle between displaying the different location labels. If no alternate location label exists, the PDT will display the EDC location even with this option turned on.

5.51

8912 Add the ability to apply a file accession price 628 for files in box.

Now it is possible to charge a different fee for filing a new bar coded file (as opposed to a returning file) into a box. This provides a useful mechanism for processing, tracking, and billing for inter-files as well.

8812 Add ability to apply the tax based on the billing building 187 that the client belongs to.

This is useful if you have customers that are affected by different municipal taxes. (Note that you will have to run invoicing for each billing building)

8811 Add ability to have global, customer and individual invoice notes.

This exciting new feature enables you to communicate additional information to your customers more easily through their invoices. Notes appear near the end of the invoice in a text box that will expand to include the specified text.

- Global: Appear for all customers (though you may turn them of per invoice)
- Customer: Appear on all invoices for a given customer unless turned off.
- Individual invoice note: Only appear on the specified invoice.

8809 Add ability to search by business type in the customer search form 354
8899 Add accounting key by departmental invoice 651 when exporting invoice data
8926 Ability to enter a class for export to Quickbooks at the customer level 231.
8950 When adding new customers using "copy and add 252", the copy options should be remembered
8999 Allow adding orders with only returns and line items as pick and run
9017 Allow searching by alternate location 387 in the Location module.

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5.52

8766 Accept DELETED items that are returned to the record center

When a customer marks a box as permanently out, future storage charges are canceled, however, the box still exists. Due to customer needs, EDC has been modified so that "Deleted" boxes can be accepted back into inventory. Storage charges are automatically reinstated.

8693 ActiveWeb: Add a Start Date range filter in the Advanced search options.

9065 For Invoices sent by e-mail, add a system-wide BCC e-mail address and a reply to address 205.

Filling out these fields is important if you send invoices by e-mail. The reply-to address will receive any out-of-office replies and delivery failure notices, and the BCC of the e-mail allows you to confirm that the e-mail was sent

9070 Add user option "Don't ask for password at RC 276"

8815 Add ability to indicate the capacity on location barcodes.

If you would like to have the capacity on any location labels newly printed through EDC, consider modifying your location label template 213 to include this field.

8881 Add customer option to automatically produce a list of authorized users 240 when sending invoices.

9011 Add a customer option to remove the "quantity shipped" and "quantity returned" 232 from the return slip and the delivery slip.

Setting this option to Yes is generally considered to be a good idea, especially if you automatically e-mail delivery and return slips, and if your customers are not billed using the "Container" courier billing method.

8546 Add option to specify delivery type 202 for destruction and perm-out billing and box schedule orders.

Note: while this change improves the transparency of EDC RC without affecting functionality, you will have to complete these fields in the system information module in order to make any other changes in this module. If you have any doubts, check which delivery types were used on prior tape rotations and disposal orders, and use the same one.

8955 Improve workflow for Fax deliveries 141 to use Imaging on demand module

Fax deliveries are now performed by a method that is consistent with the methods for imaging on demand. Open the Orders->Imaging on demand module to specify the number of pages to bill for. Also note the related change: It is now possible to specify a fax number for an authorized user, and this number will appear on delivery slips for fax deliveries. These two features may help you to greatly streamline fax delivery processing.

9091 Add a customer option for disposal mode integrity 233.

It is now possible to bypass the disposal date and type integrity options for specified customers.

9100 The Create By-Pallet List from the Disposal 406 and Transfer 420 modules should indicate the quantity on the list.

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9089 Add "automatic" container billing option 230

The *container* courier billing method requires an employee to manually enter the quantity of items shipped. This step can be vulnerable to errors which will directly affect the customer invoice. This new feature allows you to skip the manual entry by specifying the number of files that can fit into a container. (Boxes are treated as one container.)

9116 Allow specifying return price code for item and container courier billing in delivery type 622

For customers that are billed by item or by container it is now possible to specify different price codes for outgoing versus incoming delivery handling. This can be used to provide your customers with additional information on their invoices.

352 Allow deleting images after they are saved 499
9117 Add ability to automatically charge web access fee 231

Consider using this feature for billing for web licenses instead of using periodic invoice items if you would like EDC to adjust web license fees based on either (1) the number of licenses, or (2) the number of inventoried items (boxes and/or files and/or images). The charge is per month and appears on the service invoice.

9104 Add import option "replace notes instead of appending 485"
9124 Add customer option, Data capture before accession 234

This great new feature will allow you to send an e-mail to address specified per customer account listing any boxes not yet modified by data entry at the time that it first arrives at the record center. Note that this feature presently sends an e-mail to the delivery supervisor e-mail address as well as the authorized user associated with the first order on the delivery. For some customers this may not be ideal, so this functionality will be refined in an upcoming release.

9137 Add customer option to hide invoice lines with zero cost 228
9107 Implement file to search for existing inventoried files when not found

Now, if a customer requests a file that has previously been added to a box in inventory, the file-pick to search fee will also be applied for unsuccessful searches for these files if the file to search conversion option 234 is turned on for the customer.

9110 Allow users to import data from the web

To allow your customers to import data on the web, add an import description file for them to select from, near the top of the customer information module.

9223 Add ability to resize an IN box with a "special" move list

If boxes have been assigned the wrong size, you can now easily correct this by performing a regular move on a PDT to a location of the correct size, and uploading the result in the Maintenance->Box and File Maintenance module, to the File->Upload resize move list 497 menu option.
Similarly, if items need to be transferred between vault and regular storage locations, a feature was added in the previous release for moving items between regular storage and vault 497 with a move.

9262 Don't send multiple order confirmation emails 225 to delivery supervisor

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If the e-mail address for the authorized users who placed the orders is the same as the one for the master delivery slip, EDC will only send the master delivery slip and not the confirmation of shipment of the individual orders to this address. (If you are not already using the e-mail delivery / return slip options, this might be something of value to your customers.)

5.54

9176 Printing of delivery slips in order of delivery route

For record centers with many deliveries per day, this new feature may save significant time. Consider modifying your procedures as follows:

- When performing delivery creation, deselect the option to print delivery slips 533 in the delivery creation module. Any deliveries that cannot go on routes will still be printed.
- After creating your routes in the delivery route module, for each route, use the File->Print delivery slips of route 546 menu option to print the delivery slips for the route in the correct order.

9251 Add ability to export user rights report in CSV format 279

This feature is very useful for helping customers to manage the access rights of their users. The CSV format is designed to be used in a spreadsheet so that users can apply filters to the data and quickly determine who has access to

9349 Show user fax number 276 on delivery slip

For users that request fax delivery service, it would be worth filling in this new data field, as it will save the labor of looking this information up.

9350 In order module display and allow editing " Perm Outs 522 " request after item is added to order

9352 Create a report to list the recurring orders 583 schedules for a customer.

9399 Compute destruction credits based on box withdrawal dates instead of the destruction list

Since large withdrawal lists may take considerable time to process, this change ensures that customers are credited for storage space that is liberated as each pallet is processed, rather than waiting for the whole list to be completed.

9131 Add the ability to specify the number of boxes, files, and tapes to pickup from the customer 511

When placing an order to have unspecified items picked up, users can now separately specify the number of boxes, files, and tapes, instead of just the number of items. This appears on the delivery slip, and in the delivery routes module for route planning purposes. (This change is for reference purposes and does not affect billing in any way.)

2770 Create Highwater storage 228 billing option

Consider this billing option if you wish to bill in arrears for the maximum number of items that were in storage over the billing period for a customer.

9531 Log ActiveWeb sessions in access log table 193

Web login events by authorized users are now visible in the Access Log table. Being able to see

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what login was used and when can be useful for tracking purposes.

5.55

9450 Create stored procedures to get notes 374 and barcodes 374 in reports

For advanced users, these enhancements will enable you to add multi-line notes fields to reports and will greatly facilitate the creation of custom reports for printing box, file, and compact tape labels. On the data tab of report builder, you would add a calculation with an expression such as "GetBoxBarcode36(CustNo, BoxDDNo)". More details and additional stored procedures are listed in the reference manual 374.

9468 Add information on authorized users CSV export

A function was added to the authorized users module to make it easier for record centers to help their customers to periodically review their list of authorized users and their access rights. (Customer->Authorized User, File->Export User Rights to CSV).

9470 Add methods to Edit Perm Outs 522 and Edit Recipients 522 for an order.

These new functions simplify the process of correcting errors made while the order was being placed.

9191 Add customer option to show end of rotation delivery slip reminder 237

Tape customers will frequently create their tape rotation schedules for several years in advance. This new feature protects the customer against inadvertently failing to add new delivery dates when the schedule runs out, by placing a warning on the delivery slip for the tape in question. By default, this option is turned on.

9256 Allow "non-pickable" order items, and have such orders, group, close, and verify automatically

This is a significant enhancement to the work-flow in EDC. In general pricing 635, review all line-item price codes. If they are not items that require picking, mark them as such. This will make it easy for you to automatically create deliveries for the purpose of capturing charges. You may also modify your "record center work" delivery type to reflect these changes (make the ship mode by time, so that it will print out immediately upon order creation). You will also want to update your operations manual and train your staff on the simplified procedures.

9490 Add ability to save query timeout settings per report 370

Complex reports may take a long time to run, especially at record centers with a lot of inventory. This option enables you to modify and save the query time-out for specific reports that you allow to take a long time to run. (Prior to this change, the setting could be altered but the change was not saved.)

9534 Allow billing for EDM storage

With the appropriate web license, customers may manage and store electronic documents on your server. The price code to modify for this is ISTR, which now captures both image and document storage charges, in MB/year. You may wish to rename this price code to reflect this if you offer electronic document storage.

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9538 Do not apply the trip charge and the gas surcharge prices when all items on a delivery are excluded.

If all items on a delivery are excluded during picking and there are no returning items or line items, the trip charge and fuel surcharge is not applied, and the delivery is marked as Verified during delivery creation.

9576 Make font for special instructions on delivery slip bold

Special instructions appear near the bottom of delivery slips. However, so does other information such as notes associated with delivery address, which drivers might learn to ignore. Having the special instructions in bold make them stand out for the driver.

9139 - An interesting new feature will e-mail your customer and log an entry in the process errors report if the customer sends you a new box for accession that has not yet been modified by data entry - whether through ActiveWeb, a data import, or directly in EDC RC. See **Customer->Customer Information**234, Datacapture before accession234. Be aware that at present, this feature will e-mail to the same address that delivery addresses are sent to, as well as the authorized user for the first order on the delivery. In a future release, a new e-mail field added to the customer information module for this purpose will be used instead.

4 Setting up

The following topics relate to setting up the record center, or to expanding existing services. They will help you with your configuration. As long you understand the behavior of your system as it is configured, intimate understanding of these settings is not necessary for regular operations. For a discussion of procedures that can be used in creating your own operations manual46, please see the Procedures and training102 manual

In setting up your record center, you will define your standard operations and configure your system to match. DocuData will help you with this initial configuration and with changes to this configuration as your business develops.

Previewing this section will help you to prepare necessary materials and make operational decisions to ensure a smooth transition.

4.1 Prior to setting up

4.1.1 Operations manual

Every professional records management facility should maintain a current operations manual which includes both standard practices and special cases.

Some reasons for maintaining an operations manual:

- Consistently deliver your customers what you have sold them, ensuring that nothing is forgotten
- Train new employees as you grow
- Facilitate coordination and exception-handling by promoting consistency between employees and over time.
- Review procedures and discover ways to increase efficiency
- Maintain and even improve your level of service as you grow
- Learn from experience as an organization by documenting new and improved solutions and innovations
- Calmly plan for scenarios that could affect your business. (eg. operations manager cannot be

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reached)

(Note that you should also have a "disaster recovery plan". In addition to its practical value, this is also an important marketing document which many customers may wish to see for reassurance that their documents are in good hands.)

Building your operations manual
During your initial configuration and training, DocuData works with you to develop a work flow that is specific to your needs. You will want to document this workflow as a starting point. Since every record center is different, the procedures described in this generic manual here will not be identical to those at your record center. However, identifying and tweaking the relevant topics from the Procedures and training manual 46 can help you to get started in creating your operations manual.

As you add new services such as imaging or shredding container rotation, we recommend copying the relevant section of the procedures manual and changing and adding details for your own companies needs. A good test of the document is to see whether someone unfamiliar with that particular procedure could complete it without assistance. This might require information such as where to find shredding bins, how to handle special clients, etc.

Note: This manual is also available from DocuData in an RTF format, which may be easier to copy and paste instructions into your operations manual from.

4.1.2 Considerations in converting to EDC RC from an existing system

Converting an existing record center to operate with your new software
Existing record centers that convert to EDC RC have existing inventory and data, and will have to take into account existing customer contracts and expectations. The data conversion process involves a close cooperation between DocuData and a record center representative who is familiar with the data and operations.

Inventory and locations:

The location of all items in inventory must be accurately translated from the old system into the new, though record centers will sometimes take advantage of the change in order to implement an addressing scheme that will increase picking efficiency as the record center becomes busier.

If the location of boxes in inventory was known to contain inaccuracies, you may consider rescanning the inventory 457 in order to correct your inventory.

Other important considerations include:
Associating customer data into EDC fields
- Does the association enable your customers to easily identify and order their records?
- Do users have access to documents from the correct department?
- If the customer needs separate invoices per department, are storage and service charges correctly associated?

Service parameters:
Services in EDC RC are tracked through deliveries. When an order is placed, the delivery type - in combination with record center and customer delivery scheduling settings, determine how regular and rush deliveries are scheduled based on when they are placed.

The configuration of delivery types also affects how services are billed, and how they are processed within the work-flow.

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4.1.3 Pre-training considerations

In configuring your EDC RC software, there are many decisions to be made and communicated. The following should be considered (and if possible, provided to DocuData) in advance.

Service parameters:

- What are your standard hours of operation?
- For regular deliveries, do you offer one or two cycles per day?
- When to orders have to be in by, to be included in the next delivery cycle?

- What other delivery types do you offer? (eg. 2-hr rush, client pick-up, by date, ...)
- What box types do you store?
- What do you intend to offer in terms of shredding and record disposal services?

- Do you wish to make use of two languages? This applies both to the RC software and to ActiveWeb. (Options include English-French, English-Spanish, English Dutch.)

Facilities and identity:

- What name and address would you like to have appear on delivery slips? What address would you like on your invoices?
- What are your logo and corporate color scheme?
  - Please provide a logo which is 300 pixels high by 426 pixels wide (1.42 ratio) logo in an uncompressed bmp format. This will be incorporated on delivery slips and invoices.
  - Please also provide a logo in jpg format for use on the login screen of your web page.
  - If you know the PMS numbers of the colors in your corporate color scheme, these can be used in creating marketing materials for your web services.
- Also, please have ready any Urls (web addresses), e-mail addresses, and phone and fax numbers

- Please provide what you have in terms of a floor-plan or racking layout.
- Do you have an existing box location addressing scheme? If so, please explain it.

Pricing

- Do you have a standard pricing agreement? If so, please provide details.
- Do you have existing customer-specific contracts? If so, please provide details.
- (See Billable operations and pricing structure suggestions 49)

- What taxes apply?

Personnel

- Who will be involved in operating and supporting the record center, and what are their roles? (Sales, customer service, operations manager, drivers, accounting, IT support, etc.)
- Who will be present for training?
- How will those not present be trained?

Hardware

Please consider the availability of the following:

- Data server, web server, and workstations

(workstations with PDTs require a serial port, or an adapter to create one.)

- Thermal printer with ribbon and labels
- Laser printer (for delivery slips)

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- Barcode scanner for computer input
- Phone or pager capable of receiving e-mail notification (for rush orders)
- Imaging scanner

4.1.4 Billlable operations and pricing structure suggestions

Billing in EDC works by allowing you to assign price codes to billable storage and operations. There are various billing methods possible, each with its own advantages and disadvantages. The following is a summary of key prices that can be assigned, using the most flexible customer configuration: "uses box types 230", and "by item type 229" courier billing. Understanding these capabilities can help you to design your pricing structure.

Storage charges

Monthly Storage

- Regular storage charge (per box by box type)
- Vault storage charge (per box by box type)
- Open shelf file storage (per allocated linear foot)
- Minimum monthly storage adjustment

Storage is usually billed in advance, with adjustments for boxes added or removed during the period, but EDC RC does also permit billing in arrear.

Non-monthly storage

- Location rental charge: If you rent a specific location to a customer, you may assign a charge to be applied per location per storage invoice.
- Electronic data storage charge: Charge per megabyte of combined image and electronic document storage. (Note that this is charged per storage invoice, but expressed as an annual charge),

Service charges

Retrieval and re-filing charges

- Box picking (by box type)
- File picking (by box type)

- "Delivery type exceptions 629", for picking of boxes and files for specific delivery types (eg 2-hour rush. by box type and delivery type.)
- Open shelf file picking

- Box re-shelving
- File re-filing
- New box accession (replaces re-shelving fee for new boxes. May be identical, or may be lower as a promotional strategy, or higher to include data capture fees.)
- New file into box accession
- Open shelf file accession

Delivery charges (physical deliveries)

- Per item delivery handling charge (per box type)
- Per item return delivery handling charge (per box type)
- Trip charge (per delivery type, may include a number of free item handling. ie, if 5 items are included free in the trip charge, the delivery or return charges for up to 5 items will be waived.)
- Fuel surcharge (per delivery type - typically the same though)
- Per address trip surcharge (rarely used - per delivery address)

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Delivery charges (Fax and imaging)
- Per page charge
- Per delivery charge (may include a specified number of free pages)

Withdrawal and destruction fees
- Box deletion fee (space cancellation fee - per box type, for boxes that are not on site)
- Box disposal fees (various disposal methods - per disposal method per box type, should include all charges including picking)

Other fees
- Web access
- Other recurring charges (periodic invoice items)
- Box sale
- Re-boxing
- Other "line item" products and services.

4.2 Management and global record center set-up

This chapter will guide you through the initial set-up of of your record center-wide parameters. Topics are introduced sequentially, so it may be easiest to view this chapter through the PDF document, which is distributed with your software and is also available through our website (www.docudatasoft.com) or support@docudatasoft.com. Many of the tasks described will be completed during your initial configuration and training with Docudata.

Topics:
Setting up new employees 50
Defining delivery cycles and business hours 51
Setting up service parameters and pricing structures (delivery types) 52
Configure system information settings 55
Setting up buildings, locations, and vehicles 58
Creating route templates 61
Configuring thermal labels 61
Customizing software text strings 63
Applying your logo for invoices and delivery slips 64
Setting rush order notification options 64

4.2.1 Setting up new employees

Employee profiles are used to identify employees within EDC RC in order to accurately track who performed which operation, and to control access to modules, functionality, and reports in EDC RC. If a new employee replaces a departing one, the old profile should be retired by setting an end date on the *Duration* of employment, and a new one should be created.

Prior to setting up your first employee, give some thought to the different types of roles at the record center, and what type of access each role requires. In the Management->Employee Group 177 module, access rights for many of the roles at a record center may already be defined. You may add 178 or edit 178 employee groups if necessary.

To set up an employee:
1. Press the **Insert** key or click the **+** button to add a new employee record.
2. Enter their **last name**, **first name**, and if desired, a **login name** that they can use instead of selecting their profile from a list when login in. Most of the remaining fields are available for your reference, and can be filled or omitted according to the policies of your record center.

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3. If they are on a temporary contract, you may enter a start and end date to their **Duration** of employment.
4. Select the appropriate **Language** setting if multiple languages are used at your record center.
5. Set the password expiration parameters. If the employee is not with you to choose a password, assign a temporary one, and select the option to "**Change next logon**".
6. Add access rights by clicking the **Groups** drop-down and adding roles. **Additional modules** are typically used for adding access rights that are specific to the individual and not the role.
7. If the employee requires Commission report access 608, check the corresponding check box.
8. Press **Ctrl-Enter**, or click the green check-mark to accept.
9. Press the **F7** key to print an employee barcode if they will log on to the PDT 104.
10. From the menu, select **Edit->Password**, and assign a (temporary) password.

The profile of your new employee is now ready for use.

Related topics
Overview (Employee) 170
Overview (Employee Group) 177

4.2.2 Defining delivery cycles and business hours

Next, we will consider the parameters that will determine when orders will be scheduled for delivery, based on the delivery type selected.

Delivery cycles:
The idea behind delivery cycles is that for greatest efficiency, your trucks will leave your record center on routes that may go to many addresses before returning to the record center. You may have two delivery cycles per day (AM and PM), or only one (see illustration below).

More urgent "by time" deliveries may be handled outside these regular delivery cycles - though it is not uncommon to add a rush delivery to a route as a vehicle is heading out.

Picking:
Picking is done by delivery cycle. When you create a picking list, the system will default to creating lists for the next delivery cycle to go out.

Picking times:
EDC allows you to specify picking times. These are the times at which all regular orders for one delivery cycle have come in, and all subsequent regular orders will fall into the next delivery cycle. You may choose to do some picking before the picking time if you know that you have a lot of items to retrieve. However, this will generally reduce your efficiency as you may end up returning to aisles that you have already picked from as new orders come in.

(**Tip**: If you tell your customers that orders must be in by 11:00, we recommend setting your picking time to 11:05, to avoid arguments if their clocks are not synchronized with yours.)

Business hours:
Business hours affect delivery scheduling as well. With the exception of "24 hr" delivery types, orders placed while the business is closed (due to business hours or record center holidays) will be treated as if they had been placed at the time when the business is next opened.

For "By time" orders, only business hours are counted. For example, a 2-hour rush order placed one hour before the record center closes will be due by one hour after the record center re-opens.

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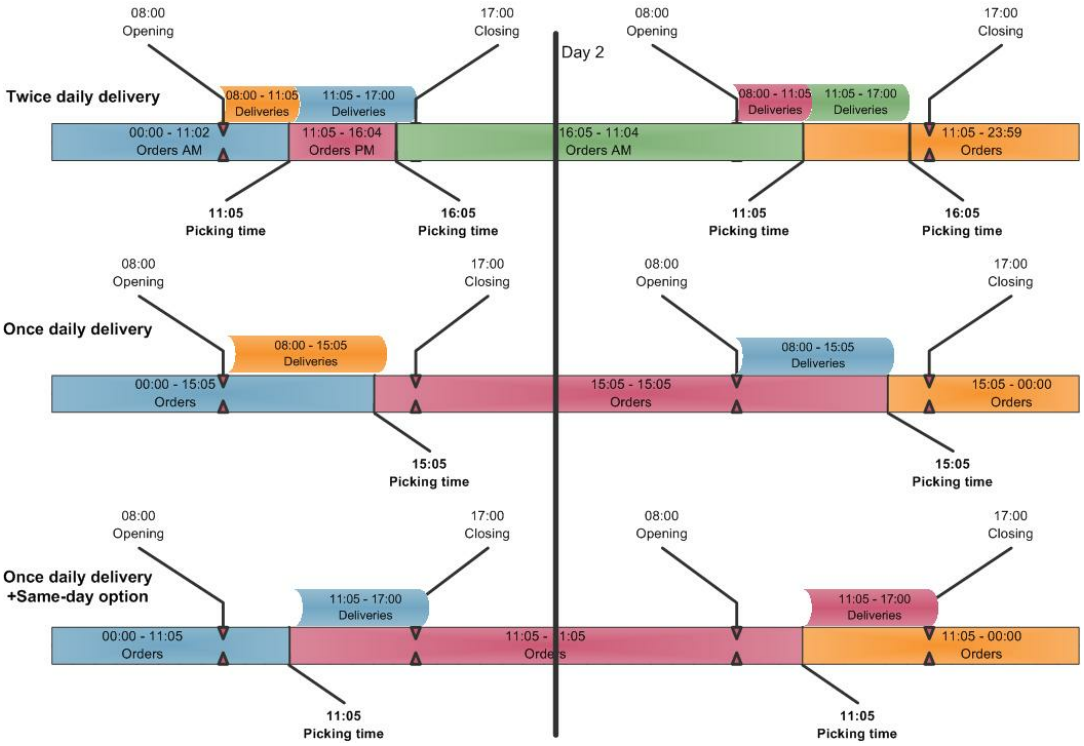
Once a day delivery options:
When you offer only one delivery cycle per day, only the *Afternoon picking time* is considered. (The *Afternoon picking time* may be set to a morning time.)
With the "Same day" option selected, orders placed before the (morning) picking time will be picked and delivered that day When it is not selected, orders in by the (afternoon) picking time will be picked that day and delivered the next day.

Customer-specific settings:
Although we recommend keeping your operations as simple as possible, business hours, picking times, and "once a day delivery options" can all be overridden per customer.

Customers can also enter customer-specific holidays. A customer holiday prevents a delivery from being scheduled for this customer on the specified date. It does not interfere with picking at the record center.



Related topics:
Setting up service parameters and pricing structures (delivery types) 52
Configuring system information settings 55

4.2.3 Setting up service parameters and pricing structures (delivery types)

Before setting up your record center, you will have some ideas about what services you will offer and how you will bill for them. In EDC RC terminology, services are *Delivered* to customers. The parameters of these deliveries are configured in the Delivery type 621 module and depend on your delivery cycles and business hours 51.

Determine which delivery types you wish to offer
Delivery types are defined in the Accounting->Delivery Type 622 module. EDC usually comes with some pre-defined delivery types that you can configure for your own use. You can also add more

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delivery types, if you want to offer additional services. EDC allows you to control which delivery types each customer and authorized user has access to, so it is possible to have delivery types that are defined but not offered to customers. Before allowing access to delivery types you will want to ensure that the delivery type is properly configured.

First, we will consider the **Ship mode** of each delivery type that you wish to offer. This affects the scheduling.

- **Regular** deliveries are scheduled according to the delivery cycle. Orders accepted before the picking cut-off time will be picked, and then delivered in the following valid delivery cycle - taking into account holidays and other settings. (note that with settings at the bottom of this module, it is possible to limit a regular delivery type to specific week days only.)
- **Half day rush** can be used by record centers that only deliver once-daily (and to accelerate the delivery. It sends a notification e-mail when an order is accepted so that items can be picked immediately and delivered with the regular deliveries one day earlier than it would otherwise be. (i. e, the same day if the picking cut-off has not passed, and the following day if it has.) - This option is not widely used.
- **24-hours** is used for after-hours and holiday deliveries. Schedules deliveries by time based on the **deliver within** setting, ignoring business hours and holiday schedules. If a record center does not offer service outside business hours over the web, since it is possible to turn e-mail notification on or off with this delivery type.
- **By time** also schedules deliveries based on the **deliver within** setting, taking into account business hours and holidays. Thus, if a by time order do be delivered within 2 hours is placed only one hour before closing, it will be deliverable by 1 hour after the record center re-opens. E-mail notification is sent out with by time orders. If an order that is not deliverable until the next day is placed online, the customer is warned before the order is accepted, allowing them to select a different delivery type if necessary.
- **By date** delivery types allow you to schedule deliveries for a future delivery cycle. Unless the bypass by date order check 198 option is turned on (which is dangerous!) by date orders cannot be placed for holidays or for dates that would be delivered earlier than a regular order placed at the same time.

Next, we will consider the **Courier** option. This will affect how the goods or information are delivered to the customer.

- **Record Center** is the traditional delivery method. Such deliveries may be included on your truck routes and involve your drivers going to the delivery address to drop off and pick up items.
- **Imaging** deliveries are performed using a document imaging scanner instead of a truck.They are performed 141 through the imaging on demand 539 module, and customers receive an e-mail notifying them that they can view their requested images on ActiveWeb as soon as the delivery is completed.
- **Fax** deliveries consist of faxing information from the requested files to the customer. The work-flow in EDC is quite similar, though you will be required to manually enter the number of pages scanned whereas imaging deliveries are able to count the number of pages automatically.
- **External** courier is used for physical deliveries that do not go on delivery routes. One example might be if you have a commercial courier pick up or drop off items for a particular customer. Another might be if the customer were to come to the record center to pick up or deliver items.

The **Record center only** option makes a delivery type available for orders placed through EDC RC, but not available for selection by the customer for orders placed online. This is commonly used for special and "no-charge" delivery types, used for purposes such as capturing charges for work done on behalf of the customer around the record center, providing a service that the customer can only order indirectly (such as tape rotations) or for waiving charges on a delivery due to special

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circumstances.

The **Ordering** setting determines the order in which delivery types appear in lists. Those with lower numbers will appear higher on the list. You will probably have a Regular delivery type as #1, whereas an 24-hour delivery type may be #99, as you will not want such an expensive option selected accidentally.

Finally, the **Price Code**, **Return price code**, **Trip Charge**, and **Fuel surcharge** settings relate to billing. Each of these accepts a price code, which must be defined in the General Pricing 632 module.

- **Price Code:** For imaging and fax delivery types, this is the per-page charge. For other delivery types, whether and how this setting is used depends on the customer's courier billing setting 229 .

Courier billing option	Price code applied
Delivery	Once per delivery
Container	Once per outgoing container*
Item	Once per outgoing container*
Round trip item	Once per container per direction
By Item type	- Not used - (pulled from box type)
Item type round trip	- Not used - (pulled from box type)

- **Return Price Code:** For delivery types that are not imaging or fax, whether and how this setting is used depends on the customer's courier billing setting 229 as follows:

Courier billing option	Return price code applied
Container	Once per returning container*
Item	Once per returning item

- **Trip Charge:** This is applied once per delivery. For customers that use By item type or Item type round trip courier billing, it is possible to have this trip charge include a specified number of items (either the most or least expensive) free of charge (this can be seen in the general pricing module).The trip charge price code will typically differ from one delivery type to the next, though regular and by-date delivery types will frequently use the same price codes, so that orders of these delivery types can be grouped onto the same deliveries.
- **Fuel Surcharge:** This can apply to physical deliveries. The same price code is typically used for all delivery types, allowing the record center to adjust a single price code in order to compensate for fluctuating fuel prices.

System delivery types
In addition to delivery types for services ordered directly by customers, the system also requires delivery types for capturing specific types of charges. The delivery types themselves will be "no charge" - with $0 price codes for the "price code" field, trip charge, and fuel surcharge.

Delivery type	Ship mode	Courier
Box change delivery type	Regular	Typically external
Scheduled order delivery type	By date	Record center
Withdrawal list delivery type	Regular	Typically external

To set up these delivery types you will require price codes. See setting up delivery types 71 and configuring EDC for invoicing 64

Related topics
Overview (Delivery Type) 621

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Overview (General Pricing) 632

4.2.4 Configuring system information settings

The *Management->System Information* 195 module contains many parameters to tailor the behaviour of *EDC RC* to the needs of your specific record center. Some of these settings must be set for your record center once, and will likely never change. For many of the other settings, the default values are appropriate, but it is good to know that other options exist should you wish to alter the behaviour.

Once again, Docudata will go through these settings with you during your initial set-up, and support is available via our support portal and support@docudatasoft.com.

Open the system information module in edit mode.

1 Click on **Management->System Information** from the *Main window*.
2 Click on **Edit->Edit**.

General settings:

Field	Suggestion	Notes
Date mask		Regional setting
Default Box Volume	1.0 or 1.2	Depends on whether box volume is tracked in cubic feet or standard boxes
Bypass volume check	No	
Location on file out labels	?	Can be useful for re-filing if boxes rarely move
Bypass by date order check	No	Dangerous. Used temporarily, for backdating.
Add file to PRE ADD boxes	No	Except for imaging boxes that do not have inventoried files.
Bill full month add / del default		No if you prorate storage
Show user module on Web		No if you collect signatures for all users authorized to place orders
Default file out cards	Yes	
Storage Credit Default		Yes if you pro-rate storage
Paper Type		Regional setting
Number of Return Slips to Print	0	
Print Picking Labels	Yes	
Number of Invoices to Print		2, if you mail a copy and file a copy
Print Refile Errors		Can be useful in training and when using temporary workers

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Field	Suggestion	Notes
Number of Delivery Slips to Print	1 or 2	Depends on delivery options
24 hour paging		Yes if customers may place after-hour orders online
Print Excluded Items		
Hardcopy Invoice	0 or 1	1 if you want a print copy of electronic invoices
New label on box accession		*No* if you issue pre-printed labels to customers, otherwise *Yes*
Low disk space warning (MB)		You would increase this value to warn you earlier if you have many customers uploading images and electronic documents.
Box Chg delivery type 52		A no-charge regular type to capture reboxing charges
Scheduled order delivery type 52		"Tape rotation" or "By Date" - depending on whether you want tape rotation orders to group with regular and by date orders
Withdrawal list delivery type 52		A no-charge regular type to capture deletion, disposal, and transfer charges

***Replication**

Field	Suggestion	Notes
DocuData RPC server		services.docudatasoft.com :443
RPC server at RC		External address (URL) for ActiveFile replication
Internal LAN		Internal address for RPC server used for ActiveFile replication
Web RPC server		Internal address for for RPC server used for ActiveWeb

Locations

The location mask indicates which characters (alpha/numeric) are allowed at each position. The location mask defines the sequence of characters that can be a valid location address at the record center, as well as how this address is interpreted. This is selected in consultation with DocuData, and not changed once it has been set.

In general, the mask should have the following characteristics:
- Easy to interpret in the record center
- Long enough to clearly encode all of your locations, but short enough to fit nicely onto barcodes, and to type into the PDT by hand if necessary.
- Flexible enough to accommodate different types of locations, including regular storage, transit

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locations, and holding locations used for sizing boxes upon arrival.

A typical mask might be "!-!!-!!!!-!!!", where "!" represents any character, forced to uppercase. (more details on what different characters in a mask mean are available with the definition of mask criteria[727] in the glossary).

Field	Suggestion	Notes
Location Mask	!-!!-!!!!-!!!	
Building Length	1	One character ; Building number (or letter)
Floor Position	3	Typically the floor or picking level
Floor Length	2	

The location mask always starts with a building code, which will typically be one character long, depending on the setting used for the Building Length field. This is associated with all locations, including transit locations, for that building.

Next is the "**Floor**", which is now more commonly referred to as the **picking level**. The picking level can be used to efficiently divide picking into multiple lists based on location. Picking and refiling lists on the PDT display the picking levels that they include items on, as well as the type of items and total number. We typically suggest a floor length of 2, which gives you the flexibility to use mnemonics (such as HO for holding, TR for transit, PA for pallet, DE for demo, 01 for first level, 02 for second...), yet is not excessively long, which would make it harder to read and type.

The remainder of the mask is essentially freeform. The two things to keep in mind are

1. EDC will sort your picking path alphabetically. This means that characters to the left are "most significant", while characters to the right add finer levels of detail. It also means that you will want to put the lowest location addresses further away from the your staging area, in order to minimize the distance that you are transporting a full load of items. (Go out with an empty cart and fill it up as you return towards the staging area.)
2. It should be easy to look at a location and figure out whether you are in the right Aisle, Bay, Shelf, and Position.

A typical location addressing scheme might be

B-LL-AAbb-SSP

Where

B=Building
LL=Picking level
AA=Aisle
bb=Bay (section)
SS=Shelf
P=Position

Note that if in some regions of your record center you have more positions and fewer shelves, you may switch to -SPP, using once character for the shelf and two characters for the position. This will still sort correctly for the picking order.

Location type	Scheme	Notes
Shelf storage	B-LL-AAbb-	See above

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Location type	Scheme	Notes
	SSP	
Holding locations (temporary, for sorting/sizing incoming boxes)	B-HO-SIZE-NNN	HO = Holding (HO) SIZE = box volume (0100) NNN = Number (001, etc)
Transit locations (Used in deliveries, these locations accept any number of files and boxes of any size) (Defined 186 in the building module 185)	B-TR-XXXX-NNN	TR = Transit (TR) XXXX = 0000 for default = VEHI for vehicles = FILE for file sorting NNN = Number (000,001 etc) XXXX-NNN = IMAG-ING for imaging location
Pallet storage locations	B-PA-SIZE-NNN	PA = Holding (PA) SIZE = box volume (0100) NNN = Number (001, etc)
Demo locations (For training and testing new procedures)	B-DE-XXXX-XXX	DE = Demo picking level. These locations might not actually exist.

Examples
1-01-0102-031: Building 1, shelf location on picking level 01, aisle 01, bay 02, shelf 03, position 1
1-TR-0000-000: Building 1, default transit location
1-TR-VEHI-001: Building 1, transit location associated with vehicle 001
1-TR-FILE-001: Building 1, file-sorting transit location 1
1-HO-0100-001: Building 1, holding location 001 for staging size 1.00 boxes
1-PA-0100-001: Building 1, long-term pallet storage of size 1.00 boxes, pallet 001
1-DE-0101-011: Demo location, used in training and testing.

Related topic - Set up buildings and transit locations 58, Setting up storage and holdling locations 73

Field	Suggestion	Notes
Tax calculation, GL codes, agency...		Speak with your accountant
Imaging, documents directory	port 11000	Speak with your network administrator
SMTP settings		Create a login and password for EDC RC to use.
Record Center information		Will be used on delivery slips
Invoice email BCC | Reply to		Confirm that electronic invoices went through
Billing address		If blank, RC address will be used on invoices
Alternate bar code lengths	None	Required for moving items using alternate (competitor) bar codes with PDT.

4.2.5 Setting up buildings, locations, and vehicles

Once the location mask has been defined in the system information module 55, it is possible to start defining locations necessary for tracking boxes and files. This is done in the Building 185 module, where we can configure parameters for the existing building and add more record center locations if necessary. (The creation of other locations such as holding and storage locations 73

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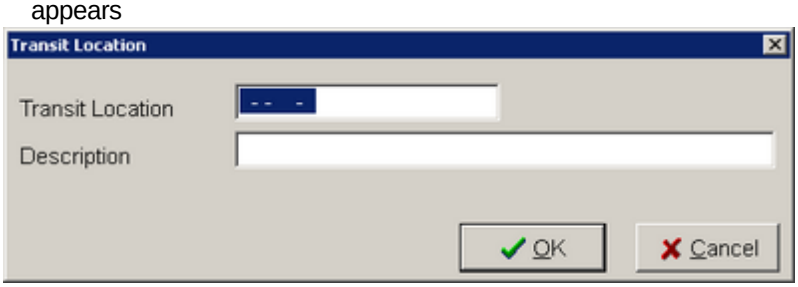
will be covered in the section on setting up for managing inventory.)

1. Open the **Management->Building** module.
2. From the menu, select **Edit->Add|Edit**.

Field	Suggestion	Notes
Building	eg. "1"	Must match building length of location mask
Description		Often the city or street name of the facility

Transit Locations
Transit locations are temporary locations where items may rest before going to a permanent location. They may hold any number of items and any size of box.Examples include delivery vehicles, receiving and shipping areas, and bins used for collecting files for re-filing in batches. (**Note:** Pallets for transfers and destruction are not considered transit locations, as they can only hold pre-determined boxes, and are not re-used.)

Create transit locations as follows:
From within the building module in edit mode:
1. Click the **Transit Locations** drop-down box. A list of transit locations appears.
2. If the location that you wish to create does not already exist, click the **Add** button. A window appears



3. Enter transit locations (starting with the building code) and description. (See the table below for suggestions), then click the **OK** button.
4. Repeat until all desired transit locations have been entered.

The following are common types and examples of transit locations, using the default location mask 56.

Transit location	Examples	Notes
Default transit location	1-TR-0000-000	
Shipping	1-TR-SHIP-ING	
Imaging	1-TR-IMAG-ING	
Delivery vehicles	1-VEHI-001, 2, etc	
Receiving	1-TR-RECE-IVE	
File sorting	1-TR-FILE-001,2,etc	

Field	Suggestion	Notes
Multiple Transit Locations		If this is set to NO, the system will use the default transit location rather than prompting for it, for operations such as returning

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Field	Suggestion	Notes
		items through the software, and imaging on demand.
Statistic threshold	15 minutes	Not widely used. See reference manual 187.
Alternate location label on pick list		Applies to record centers converting to EDC.
Tax A, Tax B	%	According to local tax rates
Address		
Contact		

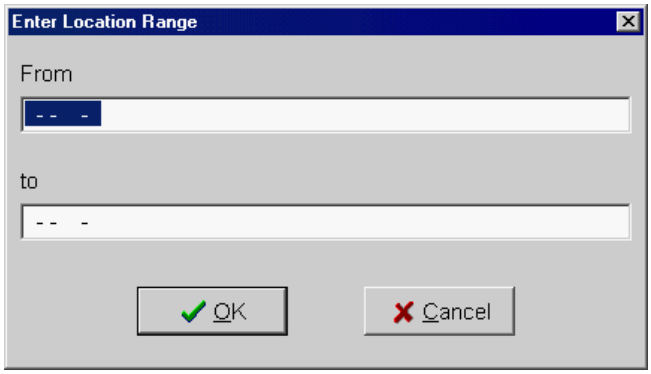
Associated Buildings
When an association is created between two buildings, regular picking list creation and delivery creation done at one building will include items and deliveries at the other buildings as well. (Note that Pick and Run for rush orders is still building-specific).

This is usually done as a temporary measure when one of the buildings is only partially staffed and items are moving from one to the other. If two separate facilities are always run by the same staff, it may be better to set these buildings up as separate picking levels of the same "building" in EDC.

- To associate buildings, click the '**+**' button and select the associated building from the list.
- When you are done editing the building information and adding transit locations, press **Ctrl-Enter** , or click the green check mark.

Printing transit location labels
Printing off transit location labels will permit you to label file sorting bins and provide your drivers with truck bar codes for scanning returning items to.

1. If you are not already in the building module, open the **Management->Building** module.
2. Click on **File->Print transit location labels->Thermal**. A window appears.



3. Enter an interval of locations and press **OK**. The labels will be printer on the thermal printer.

Note : Within the range specified, this function will only print transit locations. It will not print labels of regular storage locations.

Setting up Vehicles
In EDC, a vehicle is simply a vehicle description, associated with a transit location. Vehicles are used in creating delivery routes.

To add new vehicles for the vehicle transit locations that we have just created:

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1. Open the **Management->Delivery Vehicle** module.
2. Click the green '**+**' button.
3. Type in a description of the vehicle that will be meaningful to you
4. Select or type a transit location
5. Press **Ctrl-Enter** when done.
6. (Repeat for all vehicles)

4.2.6 Creating route templates

Delivery routes and route temples exist to facilitate the delivery and the validation of items.

A route consists of a list of deliveries ordered by delivery address. A route template consists of a name, to which a master list of addresses can be assigned. When a route template is applied, EDC will pull in available deliveries going to those addresses, in the specified order.

EDC "learns" the routes as new addresses are added to it. During the set up, we will simply create the route template names as follows:

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Route Templates**. A window with the list of existing route names appears.
3. To add a route template, click the **Add** button. A window appears. Enter the name of the route template in the field. Click **OK**.
- To delete a route template, select the specific route template in the list (it will appear highlighted) and click the **Delete** button.
4. When satisfied, click **Close**.

Related topics:
Overview (Delivery Route) 543

4.2.7 Configuring thermal labels

EDC RC comes pre-configured for printing most thermal labels on 2" high by 4" wide label stock. Tape labels are pre-configured to 0.5" high by 2 labels of 1.5", side by side.

These labels can be modified using the same built-in report builder used by the Inventory->Report module. This gives you great flexibility to modify the text, graphics, and fields present 368.

1. Open the **Management->System Information**.
2. From the menu, select **Edit->Label Templates**. A window appears.

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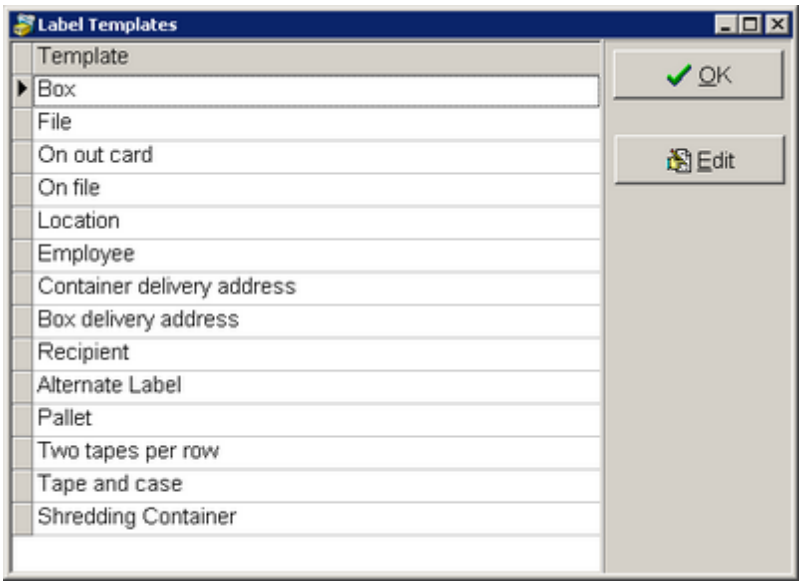
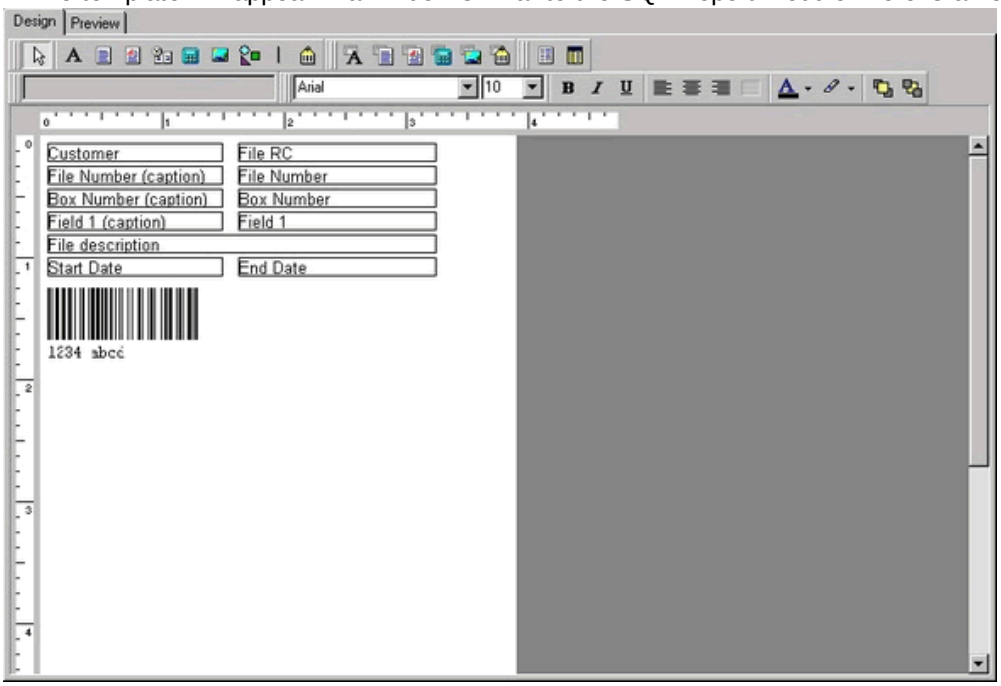


3. Select the template and double click on it or click the **Edit** button.
4. The template will appear in a window similar to the SQL Report module. Here is an example :



5. The information can be deleted, modified (size or text format) or moved. For more detailed information concerning the modification of label templates, see the Working with the design tab 368 topic.
6. When all the changes have been performed, close the window. The system will prompt you to save the changes. To save the changes press **Yes**.
7. If you have no more templates to edit press **OK**.

Related topics:

Printing bar code labels 328
Overview (Report SQL) 364

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4.2.8 Customizing software text strings

The terms used by your software are managed using the Inventory->Dictionary module, which enables you to modify them if necessary.

Certain strings will need to be modified:

1. Press **Ctrl-K** and set the search index to Number.
2. Press **Ctrl-F** to enter the string number to search for.

Term	String #	Description
RC Name	651	Will appear as the default "Return to" value for newly created customers. This appears on box labels.
Default City	1013	Used e.g. in creating new delivery addresses
Default State	1014	(see above)
Tax A Name	1670	The name of your first tax, as it will appear on the invoice
Tax B Name	1671	(see above)
Tax A Number	2483	String appearing at the end of the invoice
Tax B Number	2484	(see above)

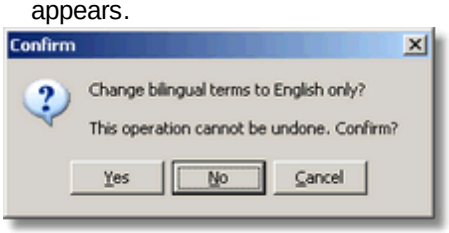
3. Press **Ctrl-Enter** to go to the string.
4. Press **Ctrl-E** to edit the string. Make any modifications.
5. Press **Ctrl-Enter** to accept changes.
6. Press Ctrl-F to search for and modify the next string.

Note: For each session of EDC, the dictionary strings are loaded when you log into EDC. Therefore, before you can see the changes that you have made, the dictionary must be refreshed. You can accomplish this by exiting and restarting EDC RC, or by switching the language to French and then back to English (from any module window, **Help->Change Language**, select French, **Aide->Langue**, select English).

Optional: Switching login screen messages to English only:
Certain strings in the default dictionary contain terms in two different languages, to communicate with users who have not yet identified their language preferences by logging in.

Record centers with customers that communicate in a single language may wish to eliminate the use of the second language in the interface as follows:

1. Open the **Management->Dictionary** module
2. From the menu, select **Edit-> Change bilingual terms to English | French only**. A dialog box appears.



3. To confirm the change, click **Yes**.

Note: This will not affect strings that have previously been altered by the record center in the dictionary.

Related topics:

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Editing the software's terminology 192
Change bilingual terms to English only (or French only) 193

4.2.9 Applying your logo for invoices and delivery slips

Your logo will appear on delivery slips and invoices. The logo file, rclogo.bmp, is located in the data directory of EDC RC. Rename your logo to rclogo.bmp in order to replace the existing image, which can be found in the data folder of your EDC RC installation. This image file needs to be of an uncompressed BMP format. Also it needs to be 300 pixels high by 426 pixels wide (1.42 ratio).

EDC will stretch or reduce the logo to match the above size, it will look odd if it is not in those proportions. If the image is smaller it will look pixelated as a result of the being stretched and if it is larger it will be unnecessarily large. It is preferable that the image file be as small as possible (it usually makes the printing faster); since you will normally be printing in black and white it would be better to have a black and white logo.

4.2.10 Setting rush order notification options

Paging options determine who receives notifications for urgent orders, and when. The first notification is sent immediately to initiate picking and the recall of delivery vehicles. If picking is not started or completed within specific time limits, notices may be sent to additional email addresses.

The orders for the following delivery types will lead to the following notification behavior:

Delivery type ship mode	Notification
By time	Yes, within business hours + paging margin 203
24 hour	Any time, if 24 hour paging 201 = yes
Half-day rush	Yes, within business hours for picking

Notifications are sent through your e-mail provider based on the SMTP settings 205 in the system information module. If you change providers or change the password on the account that EDC uses, you will have to update this information.

These notifications are sent by a service or component of EDC called the order monitor, which runs on a server. Because you could miss an order if this is unable to send e-mails, you will typically have a component called "*Order checker.exe*" running on one or more busy workstation, the function of which is to sound an alarm if the order monitor encounters difficulty.

To specify notification messages, recipients, and time thresholds for warnings:

1. Open the **Orders->Delivery Maintenance** module
2. From the menu, select File->Pager options, and fill out the form. For more details, see Pager options 580
3. Click **OK** when done.

4.3 Configuring EDC for invoicing

EDC RC uses price codes to configure charges and descriptions for many operations and products. Your software will come with some pre-defined price codes, such as the Required price codes 639.

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Other price codes will need to be created before they can be used.

If you are converting from an existing billing system, Docudata will work with you to bring in your price codes. If you are starting fresh, we recommend the following:

Create a spreadsheet of existing price codes:
1. Open the **Accounting->General Pricing** 632 module
2. From the menu, select **File->View report**.
3. Click the **save** button (diskette icon)

The saved file can be opened in a text editor or imported into your favorite spreadsheet application.

This list will include the Required price codes 639, which are the basic codes used by the system before the settings configured in the delivery type module and the box type module are applied and correspond to the billable operations 49.

Next, take a look at your proposed pricing structure. What prices or descriptions will vary based on the box type? What delivery charges will vary based on the delivery type? For each you will require a price code.

Price codes may be up to 4 characters long. We recommend using a system. For example, we commonly use a combination of two letter and two numbers, whether the letters correspond to the type of charge (eg. BR for box retrieval, FR for file retrieval), and the numbers correspond to the box size or delivery type (eg. 10 for size 1.0, 20 for size 2.0 box, and 00 for values that apply to multiple box sizes.).

If the prices are to be taken from general pricing, then you will set them up with the actual values. If a price code should be overridden for each customer, or on a case-by-case basis when reviewing invoices, we recommend setting the value to something that will stand out, such as $999,999.0

Each price code can be assigned to a GL code for accounting purposes. These can be assigned later, but you can save yourself some time by asking your accountant about these in advance.

Price code usage	Suggestion	Notes
Required price codes 639		
Box type module	AA##	AA: (eg. BR for box retrieval, FR for file retrieval) ##: relates to the box size of box type. Use 00 for a code that is used by all sizes.
Delivery type module	AA##	AA: (eg. TR for trip charge) ##: relates to delivery type, eg. 01 for regular.
Web licence	WEB#	#: relates to options
Shredding container		
Line items	L!!!	!!!: any 3 characters. Using L will make it easy to identify line items.

Adding or editing a price code
1. Open the **Accounting->General Pricing** module.

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If you are editing an existing price code

- Navigate to the desired price code and press **Ctrl-E** to edit.

If the price code does not yet exist

- From the menu select **Edit->Add**.
- You will be prompted for a price code. Enter the code and click **OK**.
- A dialog box confirms the addition. Click **Yes**.

2. Enter the desired information in the appropriate fields, then click on the **Accept** button.

Field	Suggestion	Notes
GL Code for boxes | tapes		Used to map charges to GL accounts. Speak with your accountant to learn if you need this.
English | French description		As it would appear on English | French invoices (may appear in drop-down lists and on the PDT for picking)
Price	$999,999.0 If to be modified or subject to customer override.	Applies when price breaks = None and units is not minutes. (in which case the charge is calculated at the customer's hourly rate 225.)
Units		Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.
Time	1:00 or 0:01	When the *Units* field is set to *Minutes*, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.
Price breaks	None	
Combo minimum	No	
Fractional quantity		Billing for half and hour makes sense. Half a box does not.
Line item		Can this be added directly to a delivery?
Customer specific		If line item is available to some but not all customers
Order entry, RC only		Order Entry: the item can be ordered at the RC through the orders module. RC Only: If not selected, the line item can also be ordered online.
Pickable		Applies to line items such as boxes, that must be marked as "picked" with the pdt to ensure that they are not forgotten.
Courier		Indicates to the system that it is a courier price, making it available to add to delivery types.
Tax calculation		How taxes are to be applied
Group		What heading the charge will appear under on the invoice
Maintain		If the option to Maintain Inventory is on,

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Field	Suggestion	Notes
inventory, Minimum quantity, In stock		Items ordered will be subtracted from the quantity in stock. When the minimum quantity is reached, a warning will advise to re-order.
Order minimum		Minimum number of line-item that can be ordered.
Apply commission		
# of items to include in trip (most | least expensive)		This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the *Customer Information* module is not set to *"Delivery".* These items may be of different types.

Next, let's configure the box types 67.

Related topics
Overview (Box Type) 625
Overview (General Pricing) 632
Overview (Delivery Type) 621
Required price codes 639
billable operations 49

4.3.1 Setting up box types

Box types are central to billing in EDC. Most customer accounts will be set to "use box types 230", which gives you the flexibility to assign price codes to each operation for each box type.

Prior to setting up box types, consider what your strategy will be. Many record centers encourage their customers to use standard sized boxes. These stack efficiently on standard racking. They are also easier to handle and deliver than oversized boxes. Odd sized boxes will stored in separate locations and will be placed on different pallets for destruction. Try to limit your initial number of box types. It is easy to add more box types later if you wish to accept a significant number of boxes of a new type.

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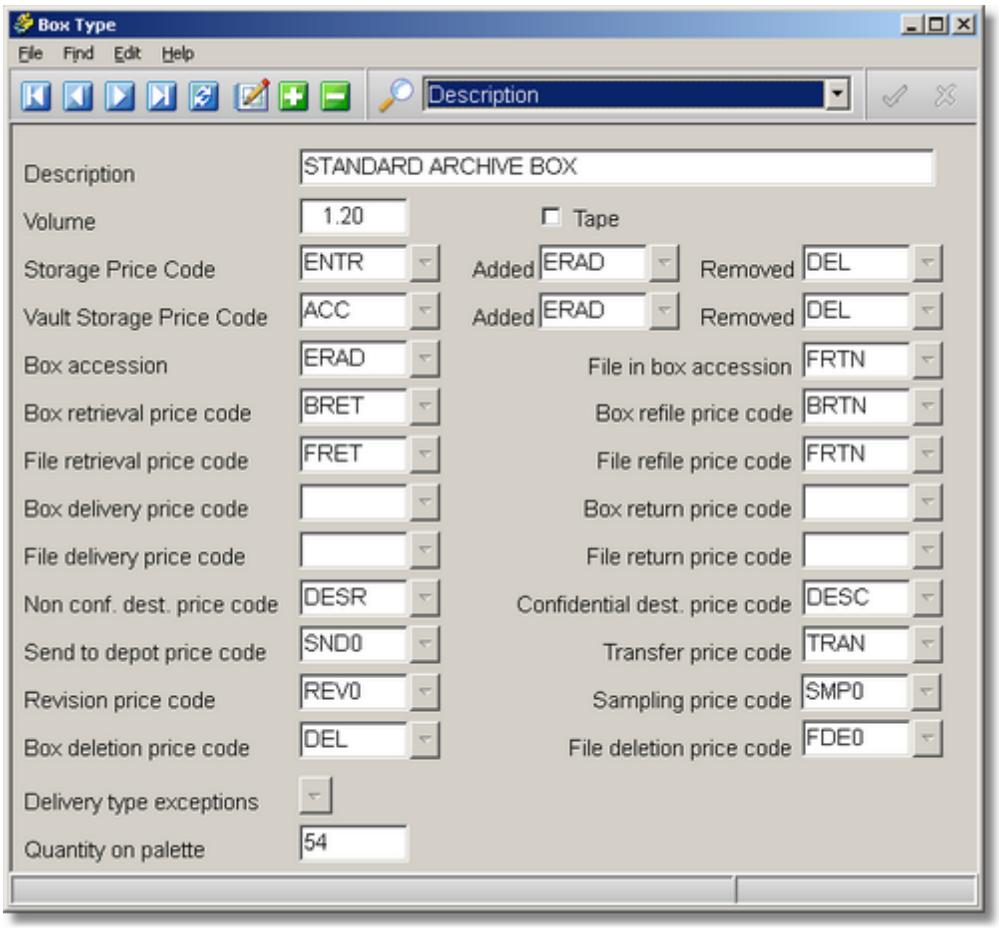

To get started configuring your box types:

Check if there is an existing box type that you could use

1. Open the **Accounting->Box Type** module.
2. From the menu, select **File->View Report**.

Depending on your installation, your software may come with partially pre-configured box types that have associated price codes. These have names like "BOX SIZE 2", "BOX SIZE 3", etc, and have volumes 1.0, 2.0, etc.. To finish configuring one of these box types, simply change the description and adjust any of the corresponding price codes that you will use.

3. Either navigate to the desired box type and press **CTRL-E** to edit, or click the green '**+**' button to add a new box type.
4. File out the fields as follows, adding new price codes 64 if necessary (see previous topic).
5. Once done, press **Ctrl-Enter** or click the green checkmark to accept changes.

Field	Suggestion	Notes
Description		
Volume	eg. 1.00	Essentially a key that links a box to the box type. Unless you are billing by volume, this does not need to match the actual billable volume of the box. Some record centers normalize to 1.00 = 1

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Field	Suggestion	Notes
		standard archive box, so that the total of the box volumes gives the equivalent of the # of standard boxes in the record center. When billing by volume, the last decimal is not used in the calculation. (Eg. 0.80, and 0.81 will bill at the same rate.)
Tape	*Yes* for tape, otherwise *No*.	This affects the type of labels that are printed, various descriptions, and other tape-specific parameters
Accession	eg. AC10	Delivery charge for bringing a new box IN and to the shelf for the first time. May be cheaper than a refile (for promotional purpose), or may be higher to capture data entry service.

Storage

Field	Suggestion	Notes
Storage Price Code	eg. SR10	
Added	eg. AD10	"Storage for added boxes" description, billed at storage rate
Removed	eg. RE10	"Storages for removed boxes" description, billed at storage rate
Vault Storage Price Code	eg. SV10, AD10, RV10	Similar to regular storage, but more expensive. (added and removed function as above.)

Picking and refiling

Field	Suggestion	Notes
Accession	eg. AC10	Charge for bringing a new box IN and to the shelf for the first time. May be cheaper than a refile (for promotional purpose), or may be higher to capture data entry service.
File in box accession	eg. FB10	Charge for "Re-filing" a new file to a box for the first time. Some record centers use this to bill for their inter-filing as well.
Box retrieval	eg. BR10	Picking charge This field can be overridden for specified delivery types 629.
Box refile	eg. BF10	Re-shelving charge. This field can be overridden for specified delivery types 629
File retrieval	eg. FR00	
File refile	eg. FF00	

Delivery handling (applies with Item type courier billing 229 options)

Field	Suggestion	Notes
Box delivery handling	eg. BD10	
File delivery handling	eg. FD10	
Box return (pick-up)	eg. BP10	

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Field	Suggestion	Notes
handling		
File return (pick-up) handling	eg. FP10	

Destruction and withdrawal
(These should including any picking charges, if applicable)

Field	Suggestion	Notes
Non conf. dest. price code		Applied for destruction of this type of box, with the disposal type **Non confidential**. (typically used for destruction that is not done under record center supervision.)
Confidential dest. price code		Price code applied for destruction of this type of box, with the disposal type **Confidential**. Used for destruction done under supervision by the record center
Send to depot price code		Price code applied for the disposal of this type of box, with the disposal type Send to depot 729. This is typically used when when formerly active files are sent to the record center for semi-active storage.
Transfer price code		Price code applied for the transfer of this type of box, through the processing of a transfer list 415. This is for moving pallets of boxes to an external storage facility.
Revision price code		Price code applied for destruction of this type of box, with the disposal type Revision 729. Revisions involves sending pallets of boxes to the customer, who will decide what to do with them.
Sampling price code		Price code applied for destruction of this type of box, with the disposal type **Sampling**. Sampling involves keeping samples of the material and destroying the remainder.
Box deletion price code		Price code applied for permanent removal of boxes of this type, either through specifying a box as **permanently out** during order entry, or by processing a **deletion list**.
File deletion price code		Price code applied for the deletion of files from this type of box. **This is not widely used**.

Other settings

Field	Suggestion	Notes
Delivery type exceptions	See Defining delivery type exceptions 630 for additional details.	The default File retrieval price code and Box delivery price codes can be overridden for any number of specified delivery types. (For example, you may wish to charge more for urgent client

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Field	Suggestion	Notes
		pick-ups.
Quantity on Pallet		Used for creating pallets for transfers and disposal.

4.3.2 Setting up delivery types

In the section on global record center configuration, we saw how to set up delivery types 52. (If you do not already know the parameters of the delivery types that you wish to offer, please review the topic.) For accounting purposes, we will confirm that the necessary price codes have been created and appropriately applied.

1. Open the **Accounting->Delivery Type** module.
2. Either navigate to the desired delivery type and press **CTRL-E** to edit, or click the green '**+**' button to add a new delivery type.
3. Configure the fields as follows:

Field	Suggestion	Notes
English Description French Description		Will appear in drop-down lists and on delivery slips, depending on depending on employee and customer language preferences.
Price code		(see below)
Return price code		(see below)

- **Price Code:** For imaging and fax delivery types, this is the per-page charge. For other delivery types, whether and how this setting is used depends on the customer's courier billing setting 229. (*By Item Type* is very flexible)

Courier billing option	Price code applied
Delivery	Once per delivery
Container	Once per outgoing container*
Item	Once per outgoing container*
Round trip item	Once per container per direction
By Item type	- Not used - (pulled from box type)
Item type round trip	- Not used - (pulled from box type)

- **Return Price Code:** For delivery types that are not imaging or fax, whether and how this setting is used depends on the customer's courier billing setting 229 as follows:

Courier billing option	Return price code applied
Container	Once per returning container*
Item	Once per returning item

Field	Suggestion	Notes
Trip Charge	eg. TR01	This is applied once per delivery. For customers that use By item type or Item type round trip courier billing, it is possible to have this trip charge include a specified number of items (either the most or least expensive) free of charge (this can be seen in the general pricing module).The trip charge price code will typically differ from one delivery type to the next, though regular and by-date

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Field	Suggestion	Notes
		delivery types will frequently use the same price codes, so that orders of these delivery types can be grouped onto the same deliveries.
FUEL surcharge	FUEL	This can apply to physical deliveries. The same price code is typically used for all delivery types, allowing the record center to adjust a single price code in order to compensate for fluctuating fuel prices.
Ship mode		This affects the scheduling.
Deliver Within		For "By Time" orders.
Courier		This will affect how the goods or information are delivered to the customer.
Ordering	Regular=1 Most urgent= 99	Affects order in which delivery types appear for selection in drop-down lists.
Record center only		Makes unavailable on ActiveWeb
Box retrieval price code	BRET	Used if box is of a size not defined in the box type module.
File retrieval price code	FRET	Used if box associated with file is of a size not defined in the box type module.
Specific days only		This affects the scheduling.

4. Once done, press **Ctrl-Enter** or click the green checkmark to accept changes.

4.3.3 Setting up shredding container types

In order to offer shredding services using Docudata's mechanism for picking shredding containers or bags and tracking charges, it is necessary to define the shredding container types that you service and assign the corresponding price codes.

1. Open the **Inventory->Shredding Container** module.
2. Either navigate to the desired delivery type and press **CTRL-E** to edit, or click the green '**+**' button to add a new box type.
3. Configure the fields as follows, adding price codes 65 if necessary:

Field	Suggestion	Notes
Description	eg-96 gallon bin	
In stock		(see below)
Rotation charge (empty, 1/4 full, etc.)	eg S96R	If you do not differentiate based on how full the container is, use same code for all.
Container emptying charge	eg S96E	
Shredding container/ bag delivery	eg S96D	Only description portion of price code is used. It appears on delivery slip or picking lists
Shredding container/ bag return/pickup	eg S96P	Only description portion of price code is used. It appears on delivery slip or picking lists

4. Once done, press **Ctrl-Enter** or click the green checkmark to accept changes.

The containers will need to be labeled. For bins, these labels may be attached directly. For console liners, record centers commonly attach the labels to a backing and laminate them before fastening

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the labels to the liner.

To print labels
1. Navigate to the correct shredding container type.
2. Press **F7**.
3. Enter the quantity of labels to print and press **Enter**.
4. The label will be printed.

To adjust the quantity of containers at a customer site
1. Navigate to the correct shredding container type.
2. From the menu, select **Edit->Customer Quantity**.
3. Enter the **customer key** and press **enter**.
4. Enter the actual number of containers presently at the customer site and press **Enter**.

This number will automatically be increased when a container is delivered to the customer and decreased when one is brought back. A report of the number of containers by customer site may be viewed in the **Inventory->Report** module.

4.4 Inventory

4.4.1 Setting up storage and holdling locations

We have already considered the general addressing scheme in setting the location mask 56 for the record center. We have also created transit locations 58. Next, we will create holding and long-term storage locations.

Holding (sizing) locations
Holding locations are temporary locations that boxes may occupy before being transferred to a long-term storage location. They have a specified unit size. Therefore, any box that has not yet had its size confirmed at the record center will be "sized" when it is first scanned to a holding location.

The work on a delivery is not complete until an item is moved to a long-term storage location. Therefore, moving box to a holding location does not cause the item to become *Verified*. The overall delivery does not go to the *Verified* state until all boxes on it have been moved to permanent locations and all files have been been re-filed (or have gone out on a new delivery).

Record centers frequently affix the labels for holding location to small soccer or traffic cones, which they keep in the receiving area. Once boxes have been scanned into the record center, they are sorted by size for shelving. The items are scanned to a cone (holding location) of the appropriate box size. The cone sitting on top of a pile of boxes can serve as an indication that it is ready to be put away.

Then, once the holding location has been emptied, it is easy to bring the cone back to the computer to verify that no boxes were missed while scanning items to the shelves.

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Location type	Scheme	Notes
Holding locations (temporary, for sorting/sizing incoming boxes)	B-HO-SIZE-NNN	HO = Holding (HO) SIZE = box volume (0100) NNN = Number (001, etc)
Pallet storage locations	B-PA-SIZE-NNN	PA = Holding (PA) SIZE = box volume (0100) NNN = Number (001, etc)

Note that while busy record centers may use wooden pallets for holding boxes in a holding location, a holding location differs from a pallet location in that a "Pallet storage location" is considered a long-term storage location, and a holding location is not.

To create holding locations:

1. Open the **Inventory->Location** module.
2. From the menu, select **Edit->Add**.
3. Fill out the fields as follows:

Field	Suggestion	Notes
Location	eg. 1-HO-0100-001	example is first holding location for boxes of type 1.00, in building 1. (Your scheme may vary)
Alternate label	(blank)	
Unit Size	eg. 1.00	This relates to the box type
All Sizes	No	
Capacity		Make it big enough that you are not likely to get boxes rejected. In practice, a holding location might contain the number of items that you would expect to put away in a re-filing operation. (eg. a cart-load or a pallet)
Vault		"No", unless this is for items requiring vault storage.
Holding	YES	
Customer = All	True	

4. Press **Ctrl-Enter** to accept the first location. The location will be added, and the Location module will create another identical record, opened in Edit mode, with the cursor positioned to the last character of the location.
5. Make any modifications to create the next location (Eg. if the first one was 1-HO-0100-001, and you want to create a second location for this box type, change the last digit to "2") and press **Ctrl-Enter**.
6. When you are done creating holding locations, hit the "**Esc**" key or click the cancel button.

To print the labels:

1. Press **F7**. A dialogue window prompts for a range
2. Enter the range of locations to print, and press **Enter**.

Pallet storage locations

Pallets are sometimes used for storage, for example if sufficient racking is not available, or if the items are likely to be moved again and picking efficiency and storage density are less of a concern for these items at this time. Pallet storage locations are usually created in the same manner described for holding location, but with the following settings:

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Field	Suggestion	Notes
Location	eg. 1-PA-0100-001	example is first pallet location for boxes of type 1.00, in building 1. (Your scheme may vary)
Alternate label	(blank)	
Unit Size	eg. 1.00	This relates to the box type
All Sizes	No	
Capacity		Pallet size.
Vault		"No", unless this is for items requiring vault storage.
Holding	NO	
Customer		Under some circumstances, you may wish to make a pallet customer-specific.

Pallet storage location labels may also be affixed to a cone placed on the pallet.

Rack storage locations

The majority of your box and storage locations will be on racking. In setting up these locations, the primary considerations are:

1. To make it easy to locate a locations, and
2. To establish an efficient picking picking path.

Guidelines for efficient picking

For picking, EDC will guide you in through the locations in alphabetical order. Therefore, we suggest the following tips:

1. Make your first location far away from your staging area, in order to carry the maximum number of items the least distance.
2. Label aisles rather than rows so that you don't end up walking the same aisle twice when picking adjacent rows.
3. Within an aisle, you may wish to consider two sides of the aisle to be the same bay, with even shelves on one side (eg. South or West) and odd shelves on the other.
4. Number bays (and potentially positions) from lowest to highest along the picking path. (for example, if you pick towards a main aisle, locations would increase towards this aisle.)
5. Make your locations include a reasonable number of items. For example, for standard archive boxes on standard racking, a location might contain 9 or 6 boxes.

Auto-create locations

Within your record center you will have many locations that are allocated for the same sized box, have the same capacity, and are identical in all parameters except for the location address. The address of these locations will follow a grid pattern that establishes an efficient picking path. The most efficient way to create many identical locations at once is to use the auto-create location function.

First, take a look at your racking lay out and determine which locations are identical. For example, if your top shelves contain 6 boxes per position and the lower shelves accept 9 boxes per position, you would create these separately. If all of your aisles are double-sided except for the first one, you might create the aisles, and then use the related "auto-destroy" function to remove the locations from the first aisle which do not exist.

Once you have analysed the patterns,

1. Open the **Inventory->Location** module
2. From the menu, select **File->Auto Create Locations**. A window appears.

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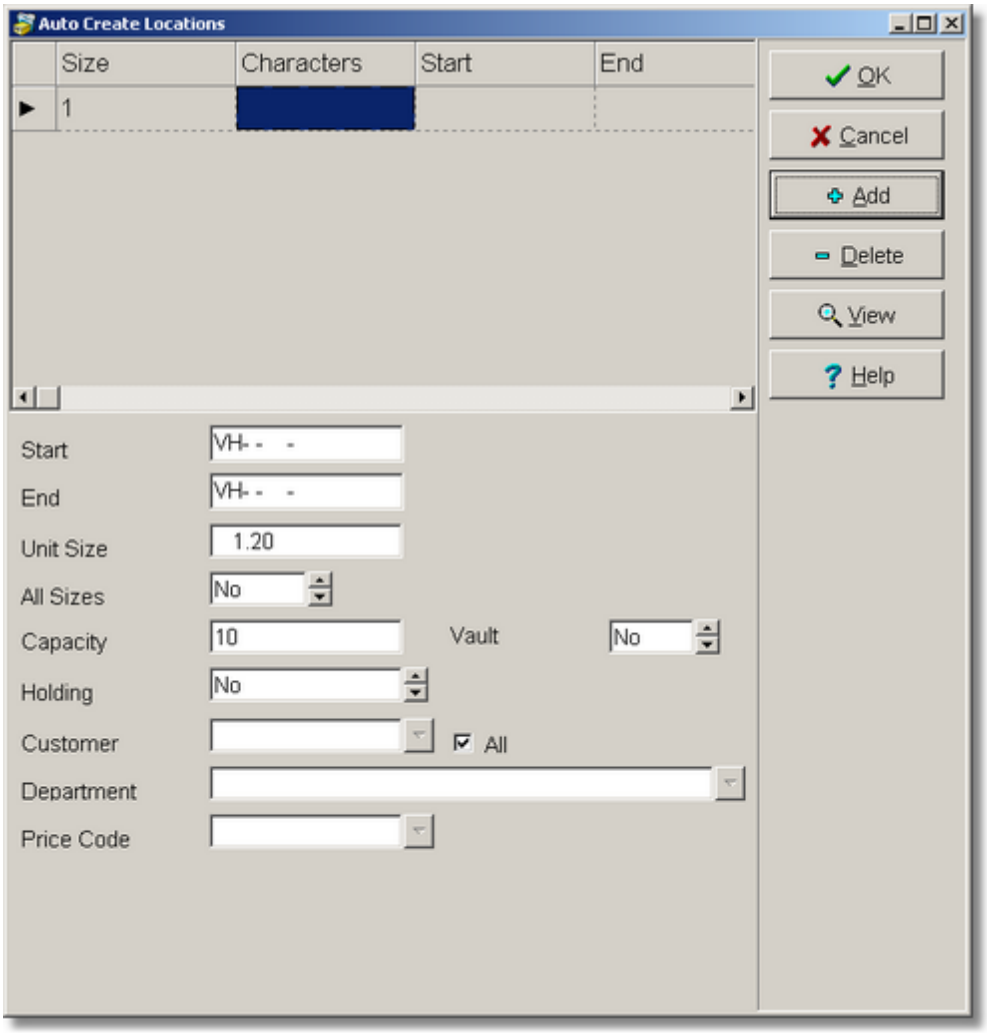

3. In the **Start** field, enter the first address that you wish to create with this operation.
4. In the **End** field, enter the last address to create.
5. In the **Unit Size** field, specify the box type.
6. In the **All Sizes** field, set the value to **No** unless you wish the location to accept any size of box.
7. **Holding** will be *No*.
8. Specify the **Capacity** (number of boxes to accept) and whether or not these location are in the **Vault**.
9. The **Customer : All** field will typically be *selected*, and the remaining fields will be blank, unless this location is being rented to a specific customer (see Fields (Location) 377) for more details.

Having specified the parameters for the locations that we wish to create, we will now establish the patterns defining the location addresses to create with these parameters.

10. Beside the upper pane, click the **Add** button to add a segment. A segment is added to the top panel.

A segment is a part of the location address that is either constant, or is established by a simple counting pattern. For example, if all of the locations that you are creating are on the same picking level, (Say "01"), then the size of the first segment would be 2, the characters required would be (0,1), the segment would start at 01, and would end at 01.

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Note that the "building" segment does not need to be specified, since you can only create locations for the building that you are in, therefore it will always be the same.

11. Click the value in the **Size** column twice to edit it. Enter the number of characters in the segment (eg. 2 for picking level.)
12. Click the value of the **Characters** column twice to edit it. This will tell the function how to count. For example, if you want to create aisle *A, B, C,* you would enter these characters. If you are creating even number shelves, a segment might use the characters *0,2,4,6,8*, in which case shelves 01, 03, etc would not be created with this operation.
13. Click the value in the **Start** column twice to edit it. (and you will do the same for **End**). Enter the start and end values for the segment to be used. (eg. if you are creating shelf 01 to 06, enter 01 for start, and 06 for end.)
14. Repeat for all remaining segments.

Once all all segments have been entered in this way, the total of the Size column should add up to the length of the location mask, minus the length of the building segment and the number of separator characters (eg, dashes.)

15. Click the **OK** button. The list of locations to be created, including the total count will be displayed.
16. Review this to ensure that it makes sense, then close the report.
17. A dialogue window will prompt "Confirm?". If you click **Yes**, the locations will be created.

If you run the Auto Create Locations function again from the same module window without closing it, the settings will be conserved. Repeat for the next batch of locations to create.

The **auto-destroy locations** function behaves in much the same manner, except that it is not necessary to specify location parameters such as unit size and capacity.

Print location labels
Give some thought to how you would like to print your location labels. You may have thousands to hundreds of thousands of these. They must remain readable despite being rubbed as boxes come and go. Your options are: 1) Print on Thermal Labels, 2) Print on Laser Labels, or 3) Export to file.

Depending on the number of labels to print and your needs, record centers will typically either print thermal labels, or may have a professional printer print location labels on good-quality labels (either by printing laser labels to a pdf printer, or by exporting the list of location barcodes and having the printer work with that.) - (please discuss this with support@docudatasoft.com if you require assistance.)

To print thermal labels
1. Open the **Inventory->Location** module (if it is not already opened).
2. Press the **F7** key. A dialogue window will prompt for a range of locations to print.
3. Enter the first and last locations in the range, then click the **Okay** button. The labels will be printed.

4.5 Customers

Because there are so many different ways that different record centers can service their unique customers, EDC RC has an almost overwhelming number of customer settings.

Once you have set up an account, this account may serve as a template for creating subsequent

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accounts using the copy and add function 252.

The following guidelines walk through the decisions and process of creating an account for the first time. For adding new customer accounts to your list of existing accounts, please see your own operations manual 46, which you may create based on the section on account management in the procedures and training section.

4.5.1 Choosing default settings for template customers

The following settings are typical settings that can serve as a guideline in setting up an initial or template customer account that can be used in creating similar accounts through the *copy and add* function. Some of your settings will likely be different, based on your marked needs. For a full reference on any of these fields, see the corresponding section in the reference manual, Fields (Customer Information) 225.

Note that your key settings should be specified in your operations manual (at least in the form of a reference to an account), and those settings take precedence over the suggestions here.

If you have existing customers set up with typical parameters and pricing, you may wish to create a template customer based on one of these, using the copy and add function. (Note: you will likely not do this if your record center size is measured by the number of accounts.)

If you wish to create your template customer from scratch, you would
1. Open the **Customer->Customer Information** module
2. From the menu, select **Edit->Add**.
3. When asked "Does this customer use the client version of the software", click **No**.
4. Set the field values, consulting the guidelines below.
5. When done, press **Ctrl-Enter** to accept.
6. Set up additional parameters for template customers 84

General

Field	Suggestion	Notes
Name		Unique per customer
Customer key	Establish your own standard eg (AAA##)	Unique per customer. Will identify customer on box labels and delivery slips. Is used by your customers in accessing ActiveWeb.
Accounting key		Optional, if identifier for exporting to account package differs from customer key.
System		(System assigned, not modifiable)
Active	Yes	If "No", the account will not appear in drop-down lists. An account cannot be made inactive while active boxes or files remain.
Locked	No	Prevents web access and orders on past-due accounts
Delivery types	Standard delivery types	Click the drop-down to build a list. This will include delivery types in your standard contract, as well as delivery types used internally by

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Field	Suggestion	Notes
		the record center (such as a "No Charge" delivery type for cancelling charges).
Ordering notes	None, unless needed	Pop up when placing an order for this customer in EDC RC.
Shredding containers	None	
Sales person		Each sales person may have their own template, in which case their name would appear here.
Apply commissions, and other commissions settings	Per your policy	
Address, and related settings		These will not be copied when copying a customer

***Billing**

Field	Suggestion	Notes
Bill to		Unique per customer, will not be copied. If blank, customer address is used
Auto Invoice	Yes	Includes this customer in monthly billing if charges exist.
Net days	eg. 0 or 30	Per your policy. If invoice is due on receipt, put 0
Billing	Regular	Law firms often use "charge back". Large companies and hospitals may use "Departmental" billing. Other small companies typically use "regular".
Invoice Start Month		Applies to customers invoiced at a frequency other than monthly.
Invoices per year	12	Service invoices are only created if there are charges to be applied
Minimum invoice adjustment	According to standard contract Usually "Storage".	This field indicates the minimum amount to charge a customer every month. If incurred charges are less (storage fees, services, etc.), and adjustment will be applied for the difference. If the Storage box is checked, the adjustment calculation will consider only storage fees. In this case, it will not be applied until the customer has boxes in inventory. The description on the invoice is taken from the price code MINV, but the price is taken from this field in the customer information module. sually applied to storage, at a monthly rate.
Separate Rent Invoice (Rent Inv.	No, except if	If "Yes", the *rent invoice start*

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Field	Suggestion	Notes
Start Month, Storage Invoices/ year)	storage is not invoiced monthly	*month* and *Storage Invoices / Year* settings will determine the frequency of storage invoices and in which months they are issued.
Page brk. detailed inv.	No	
Billing Building		Relates to invoice creation and taxes
Taxable	Yes	
Hide zero lines on invoice	eg. No	(also applies to detailed invoice and delivery summary)
Business 183		If the template is for a specific business type, use that. Otherwise, indicate unassigned.
Highwater storage 228	No	Yes if you want to bill in arrears for the highest storage volume during that period. More popular with tape accounts.
Purchase order	Blank	(customer specific, not copied from template)
Renewal date		customer specific
Charge rent	Forward	Forward tends to be industry standard in most regions. Arrears is sometimes used with tape accounts.
Storage calculation	Monthly	
Storage Credit	Yes	Use this combination if you prorate storage fees for boxes added and removed
Bill full month add/del	No	
Days per year daily billing	365	Not applied with monthly billing. Sometimes 360 with banker's calendar.
Courier Billing	By Item Type	This is the most flexible option. See Setting up service parameters and pricing structures (delivery types) 52 for a discussion of other options
Automatic container billing (files per container)	No, unless courier billing is *container*	See Fields (Customer Information) 230
Service only	No	Indicates no storage
Uses box types	Yes	(The alternative, the older method of using hard-coded price codes 639, is much less flexible.)
Hourly rate	(according to contract)	Used for price codes that have units of time.
Invoice format		Electronic requires a billing e-mail address.
File tracking charge	No	
Minimum Touches Box Change Charge	0	The re-boxing charge will not be applied if the box has not been touched at least this many times

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Field	Suggestion	Notes
		for box or file orders for that box.
Quickbooks class		Speak to accountant. May be required if you run multiple businesses from same accounting application.
No charge boxes out	No	More popular with tape accounts. Requires storage to be billed in arrears.

Field	Suggestion	Notes
Web access fee 231	By user count	Create and apply a price code related to the level of license purchased by the customer

Options

Field	Suggestion	Notes
Delivery time	Both	Applies with twice-daily delivery cycle. Setting may depend on customer receiving hours or delivery location if you have AM/ PM routes.
Pick up time		
Container type	Both	"Tape only" for accounts that will never have boxes. Affects web interface.
Hide quantity from delivery/ret slip	Yes	
Language	eg. English	Will affect invoices, delivery slips, customer reports.
Types by department	eg. No	Allows different departments to have different document type lists and retention properties.
Non-track warning	Yes	Warns if customer attempt to order previously excluded, non-inventoried file.
Range mask	(Blank)	
Minimum Password Length		Depends on security policy
Delivery labels	No	(prints address labels for box deliveries)
Force passwords	Yes	
Alphanumeric passwords		According to security policy
Type integrity	No	"yes" prevents files of one type from being moved to a box of another type.
Restriction integrity	Yes	Prevents files with a restriction from being moved into a box that does not have the same restriction.
Department integrity	No	
Disposal date integrity		Depends on whether you want to help customers manage their

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Field	Suggestion	Notes
		disposal to the file level.
Return to	(Your RC).	Appears on box and file labels
Location mask	(Blank)	Applies to ActiveFile set-up.
Default Box Volume	eg. 1.0 or 1.2	Standard box or tape volume for this type of customer
Data capture before accession		This will send an e-mail if new boxes arrive without data entry
Volume Equivalence box = location	Blank	Allows boxes of one size to be put into locations of a different specified size
Order PRE ADD files	Yes	
Hide "Perm out" option	No	
Validate date range	Yes	Verifies for dates that the "from" value is earlier than the "to" value
Extra delivery slip per order	No	
File out cards	Yes	Required for standard operations
File to search conversion	Yes	Charges file search fee instead of pick when non-indexed file is excluded
Sealed box	No	Places box on order when a file it contains is ordered
Limit to one building (Building)	Yes	Applies if RC has multiple buildings. Makes delivery more efficient.
Has Split		"Yes" indicates some items have been moved to another account
Unique file number	No	Set to Yes if a customer may not have multiple files with the same file number (eg. blank)
Time with by date order	No	Allows customers to specify a time for scheduled deliveries. This information will appear as a note at the bottom of the delivery slip.
Order grouping	Yes	Otherwise each order will result in a separate delivery and trip charge.
Tape number change	No	
Immediate delivery	No	
Default box number length	eg. 5	
Default file number length	eg. 7	
Automatic box number		Useful for customer willing to use your numbering scheme
Automatic file number		
File in box tracking	No	
Use ID cards	No	
PDT Number Change	No	Turned on temporarily for special operations
Position of extra fields	eg. bottom	
Delivery with PDT		Depends on whether drivers carry PDT. Required for standard shredding procedures.
Barcode on file pick label	Yes	

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Field	Suggestion	Notes
Truck validation	Yes	
Double Pick	No	
Full text search at RC	Yes	
Show end of rotation on delivery slip	Yes	
Recycle after destruction	No	
Use expected return dates	No	Prompts customers to specify a return date for items on a order when they go out
Simple web interface	Yes	Removes banners from ActiveWeb, allowing more workspace
Web Time Out	Default	Typically 15 minutes. This can be altered for specific users
Notes on paper pick list	eg. Yes	(Picking is generally done with PDT, not paper pick lists.)
Default by date order time	eg. AM	
Hide labels module on web	No	Most RCs issue box labels in advance. However, customers may still wish to print file labels.
Hide box sale	Yes	Many record centers offer multiple box sizes for sale as line-items
Hide alternate labels on web	Yes	
User field 1 on delivery slips	No	Varies with customer data. Often No.
Lock list items	Yes	Prevents items on disposal lists from being ordered.
Fixed disposal by default	eg. No	No if customer manages disposal using EDC's document types. Yes if they typically specify a fixed disposal date in advance for each box.
Relax add to list check	Yes	
E-mail delivery / return slip	No	Set this up for each customer. Requires e-mail address, which is not copied from template.

***Accession**

Field	Suggestion	Notes
Department	(blank)	These fields are used during special operations, and should otherwise be left blank.
Document type		

Pick up

Field	Suggestion	Notes
Morning picking time / afternoon picking time	(Blank)	These override system information settings. Try to avoid unnecessary exceptions
Once a day option	"Use value in system information"	

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Field	Suggestion	Notes
Contact/Name/Telephone/Fax	(Blank)	These values are not copied from template
Mailing labels		

Invoices

Field	Suggestion	Notes
Print detailed invoice	No	These are attachments included with invoices. It is generally advisable to let customers know that these reports are available upon request.
Print delivery summary		
Print out boxes list		
Print activity report		
Print authorized users		

Fast Orders

Field	Suggestion	Notes
Default order user	(blank)	Rarely used. Fast orders skip steps in the order entry process.
Recipient		
Delivery type		
Delivery address		

Schedule

Field	Suggestion	Notes
Override default schedule	No	Causes record center business hours to be different for this customer. For example, one customer might negotiate regular deliveries on the weekend. Avoid exceptions if possible.
Deliver during record center holidays	No	
Delivery/Opened/Start/End		Not applied unless "Override default schedule" = Yes.

Related topics:
Set up additional parameters for template customers 84
copy and add 252

4.5.2 Set up additional parameters for template customers

Multiple options may be carried over when creating a new account based on existing account or template when using the copy and add function. Therefore, you will want to ensure that accounts which are to be used as templates are well set up with the appropriate generic settings.

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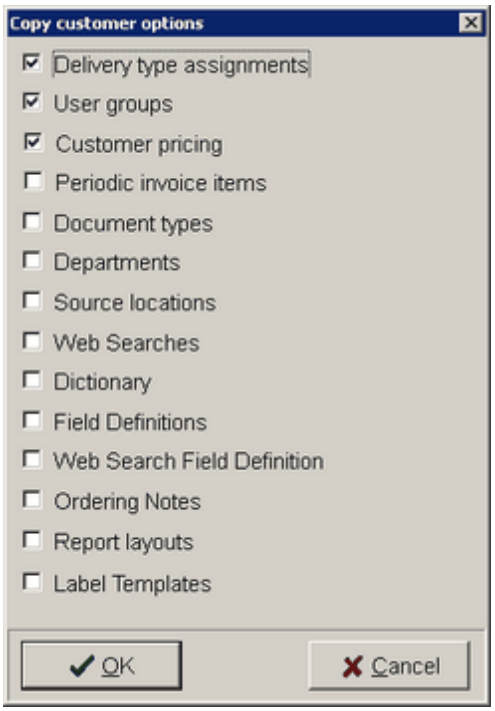

The following additional settings remain to be configured:

Copy customer option	Suggestion	Notes
Delivery type assignment		(in customer information) 78
User groups		Typically create a "Web supervisor" and "Web user" group for the template, and add additional profiles as required
Customer pricing 640		**********
Periodic invoice items 646		
Document types		
Departments		
Source locations		
Web Searches		
Dictionary		
Field definitions		
Web search field definitions		
Ordering notes		(in customer information) 78
Report Layouts		
Label Templates		

Create customer-specific lists

1. In the **Customer->Delivery Address** module, create any additional delivery addresses 300.
2. In the **Customer->Source Locations** module, define the source locations 298 if the customer intends to specify the origin of documents. (This is not widely used).
3. In the **Customer->Retention Schedule** module, define any required document types 286 not copied from the template customer. If temporary restrictions 303 exist on the destruction of certain box types, create and apply these as well.
4. In the **Customer->Customer Holidays** module, add any customer-specific holidays 305 to prevent deliveries on these days. (Note that customers may do this themselves using ActiveWeb)

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5. In the **Customer->User Groups** module, create any additional user groups 283 not copied from the template.
6. In the **Customer->Authorized Users** module, create authorized user 275 profiles and assign passwords for customer employees authorized to access ActiveWeb or place orders by phone.

Miscellaneous options

7. Import 667 box and file information, if this information is available.
8. Set up the Full Text Search 86 if the customer is using ActiveWeb or requires text searches while placing orders.
9. Set up a tape rotation 87 if the customer stores their back-up tapes at your record center.
10. Set up EDC ActiveFile 87 if the customer is using this application to manage their on-site records management.
11. Set up the customer for ActiveWeb 87
12. Set up the customer for imaging delivery 88

4.5.3 Setting up a new customer

4.5.3.1 Set up the customer to be billed

It is good practice to keep service and billing as standard as possible for typical customers. Many billing options are configured at the customer level. Therefore, it is advisable to create new customer profiles using the Copy and Add function 252 based on a standard or template customer, and then review and modify this profile to meet any special conditions.

Set customer-specific billing parameters in the Customer Information 225 module

1. *Assign Delivery Types* 226. Include types that they will be able to order (eg. regular, 2 hour rush...), and types that you will use for billing the customer (e.g. record center work.)
2. Specify the *Customer billing address*, and billing *email address* (if invoicing electronically), and complete the remainder of the billing section 226.
3. In the options section, ensure that *Order grouping* = *Yes* if multiple orders for compatible delivery types to the same address on the same date are to be grouped onto a single delivery.
4. In the *Invoices section* 240, select the additional reports to automatically include with the invoice. Typically, these are included only when it is clear that they will be useful to the given customer.

Configure addition customer billing parameters

5. If invoicing the customer by department, in the **Accounting->Departmental invoicing** 649 module, define departmental invoices
6. In the **Accounting->Customer Pricing** module, override specific price codes for the customer 640
7. In the **Accounting->Periodic Invoice Item** module, define specific periodic invoice item(s) 646

4.5.3.2 Setting up a customer to use Full Text Search

Full text searches use of an index of text fields that EDC maintains while otherwise idle.

In the **Customer->Customer Information** 225 module, set the *Full test search at RC* field to *Yes* (found near the bottom of the options section in the left column). For multiple clients, see Activating multiple clients to use the Full Text Search 246.

You can improve performance by creating 'noise words' 213 in the system information module. These commonly used words will be omitted from the index and ignored in searches. The same noise words apply for all customers.

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To trigger the immediate indexing of a customer's text fields, perform batch indexing 332 in the box and file modules.

Note: When batch indexing one or many boxes, the software will not index the boxes' files. Batch indexing may take a while, and could possibly slow down EDC for all users (it is better to do a batch indexing during less active periods.

4.5.3.3 Setting up a customer to use a Rotation Schedule

1. In the **Accouting->Delivery Type** module and the **Customer->Customer Information** module, ensure that the customer has access to a delivery type 226 with *ship mode* = *by date*, and *courier* = *record center*. (The first such delivery type will be used for scheduled rotations.
2. Generate a web license 255 for Standard + Rotation or higher.
3. Create a Rotation Schedule 358, or have the customer do this in ActiveWeb (see ActiveWeb manual for details).

Note: It is very important that record center holidays be entered in advance, to prevent scheduling of delivery on these days.

4.5.3.4 Setting up a customer to use EDC ActiveFile

EDC ActiveFile is used by customers to manage their active (in house) records and their semi-active (off-site) records together. (For details on installing the software at the client site, see the ActiveFile manual).

At the Record Center

1. In the **Management-> System Information** module, ensure that the replication 202 information section (the second section) is complete.
2. In the location that you specified for the *Client installation folder*, place the client installation package corresponding to your database level. (Find this at ftp://docudatasoft.com/record_center/ClientInstallationPackage/)
3. If the customer profile has not been not created, set up the customer 86. When prompted, "Will the customer be replicated?", click **Yes**.
4. In the **Customer->Customer Information** module, in the Address section near the top, ensure that an e-mail address has been entered. This will be used for sending the customer set-up information. Ensure that delivery types have been assigned.
5. In the **Customer->User Group** module, a group with total access must exist
6. In the **Customer->Authorized User** module, a user with total access must exist. The customer will require the user name and password.
7. In the **Customer->Delivery Address** module, a delivery address must exist.
8. In the **Customer->Department** module, if no departments and sub departments have been created, consider entering adding a default one such Department = "Select department", sub department ="."
9. In the **Customer->Retention Schedule** module, if no document type exists, create a default document type = "Select", description = "Document Type".

4.5.3.5 Setting up a customer to use EDC ActiveWeb

In the Customer section:

1. *In the **Customer Information** module, generate a web license 255 or add a web license 258 (this is for record centers that do not have access to a server).
2. *In the **User Group** module, create a user group 284 with the appropriate module accesses (ex: Boxes, Orders, System Information, Authorized Users)

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3. *In the **Authorized Users** module, create users 278 in the usual manner with the usual accesses (see also setting up a new customer 86).
a. Make sure you include them in a group with the appropriate module accesses.
b. *Give them a login name and define a password 280 (6-16 characters, not case sensitive) for them to access ActiveWeb with. Note that the minimum password length can be defined in the customer information module. It is also possible for a user to login with their e-mail address as well as their login name.

Be certain to provide the user with the correct address for your ActiveWeb.

Note:
Exceeding 10 failed login attempts for a valid authorized user within 10 minutes will cause that user to be marked as inactive. To reactivate this user:

1. Go to **Customer->Authorized User**, and navigate to the correct user
2. Press **Ctrl-E** to enter edit mode
3. Change the value in the **Active** field back to 'YES'.
4. Click the green check mark or press **Ctrl-Enter** to accept changes.

4.5.3.6 Setting up a customer to use Imaging

1. Set up the customer to use ActiveWeb. 87 They will require Imaging or Active+EDM -level web licenses.
2. In the **Customer->Customer Information** 225 module, ensure that the customer has access to an imaging delivery type.
3. In the **Customer->Authorized User module** 276, ensure that users who will placing orders for imaging have and e-mail address, and access to the imaging delivery type - either through the *User Groups* 283 they belong to, or as *Additional Delivery Types*.

When you receive an order, perform an Imaging on demand delivery 141.

4.5.3.7 Setting up a customer for shredding service

Configure the record center to provide shredding services
1. Identify the container types and services that you will offer.
2. In the **Accouting->General Pricing** module, define price codes 637 to map to each shredding operation for each container type.
3. In the **Inventory->Shredding Container** module, define shredding containers 444 for emptying and rotation using these price codes.
4. Print and apply labels 445 for the shredding containers.

Configure the customer to receive shredding services
1. If pricing differs from general pricing, override price codes 643 in the **Accounting->Customer Pricing** module. If contracts are identical, this may be done by copying from an existing customer 644.
2. In the **Customer->Customer Information** module, use the *Shredding containers* 226 drop-down field to select containers to make available to this customer.
3. If appropriate, add recurring orders 585 for shredding service

You are now ready to provide this customer with shredding service, in which you will rotate or empty shredding containers 139 at the customer site with the aid of the PDT.

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4.5.3.8 Open shelf file storage

Open shelf storage refers to the storage of files on shelves rather than in boxes. This service is commonly performed for healthcare providers who store medical records.

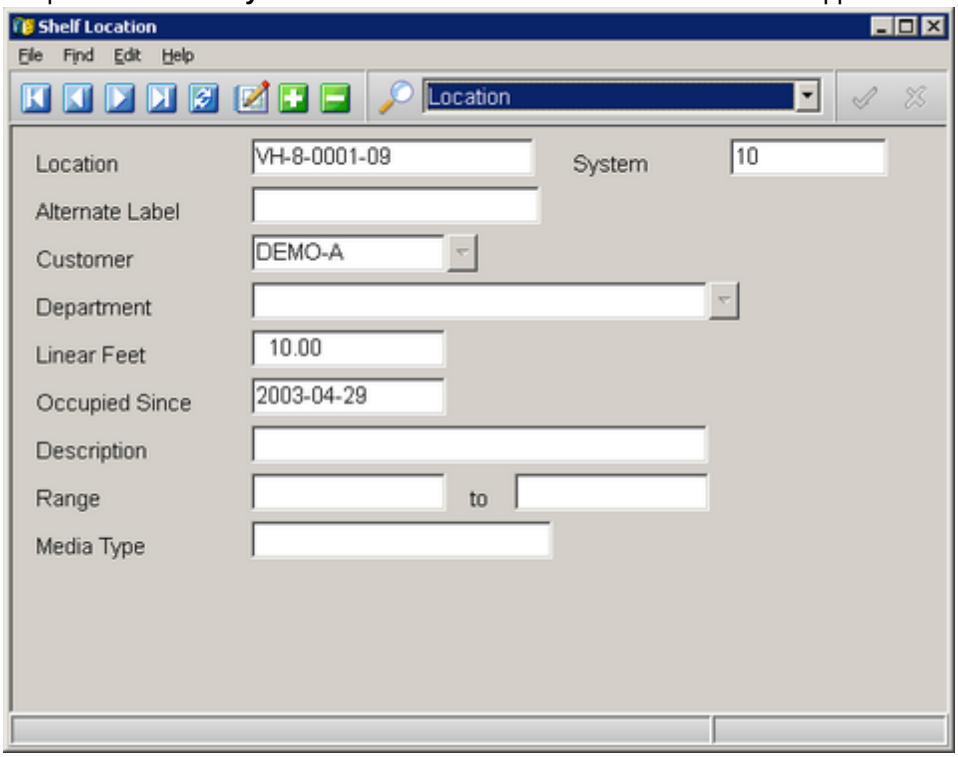
If you provide such services, the following price codes must be configured 65 for the customers requiring this service:

Price code	Purpose
EAOR	Addition of an open shelf file
ETOR	Open shelf storage (usually by linear foot)
OIAC	Non-inventoried open shelf accession
OIFN	Inventoried open shelf file return and accession
OIFR	Inventoried open shelf file retrieval
OSDL	Open shelf file delivery (if courier billing is by item type)
OSRT	Open Shelf Return Price Code (if courier billing is by item type)

Next, we will create and label some open shelf locations to use. As with box locations, we can add locations individually by filling in the form, or we may use a pattern to auto create many locations as once.

To add shelf locations individually:

1. Open the **Inventory->Shelf Location** module. The module window appears.



2. Press the **Insert** key or click the '**+**' button.
3. Fill in the details for the first location:

Field	Purpose
Location	This must fit the location mask and should allow efficient picking (see Guidelines for efficient picking 73)
Alternate	This will be left blank, unless you have location bar codes

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Field	Purpose
Label	from a previous system.
Customer / Department	Select the customer, and (if necessary for billing), the department that this location will belong to.
Linear Feet	This is used in calculating storage charges
Occupied since	This field cannot be modified and is the date that location is first occupied and becomes billable to the customer
Description, Range, Media type.	These fields are for reference and are not required. examples of media types might be "x-rays" or "patient files".

4. Press **Ctrl**-**Enter** or click the green **accept** button when when done with the first location. The location will be created.
5. EDC will automatically start creating another identical record.
6. Continue modifying and accepting records (By pressing **Ctrl**-**Enter**) until you are done adding locations.
7. Press the **Esc** key, or click the red **X** to cancel once you are done adding shelf locations.

Auto-creating shelf locations

This function allows the creation of many shelf locations in the same operation. It is virtually identical to auto-creating regular storage location.

1. Open the **Inventory->Shelf Location** module.
2. From the menu, select File->Auto Create Locations. A window appears.

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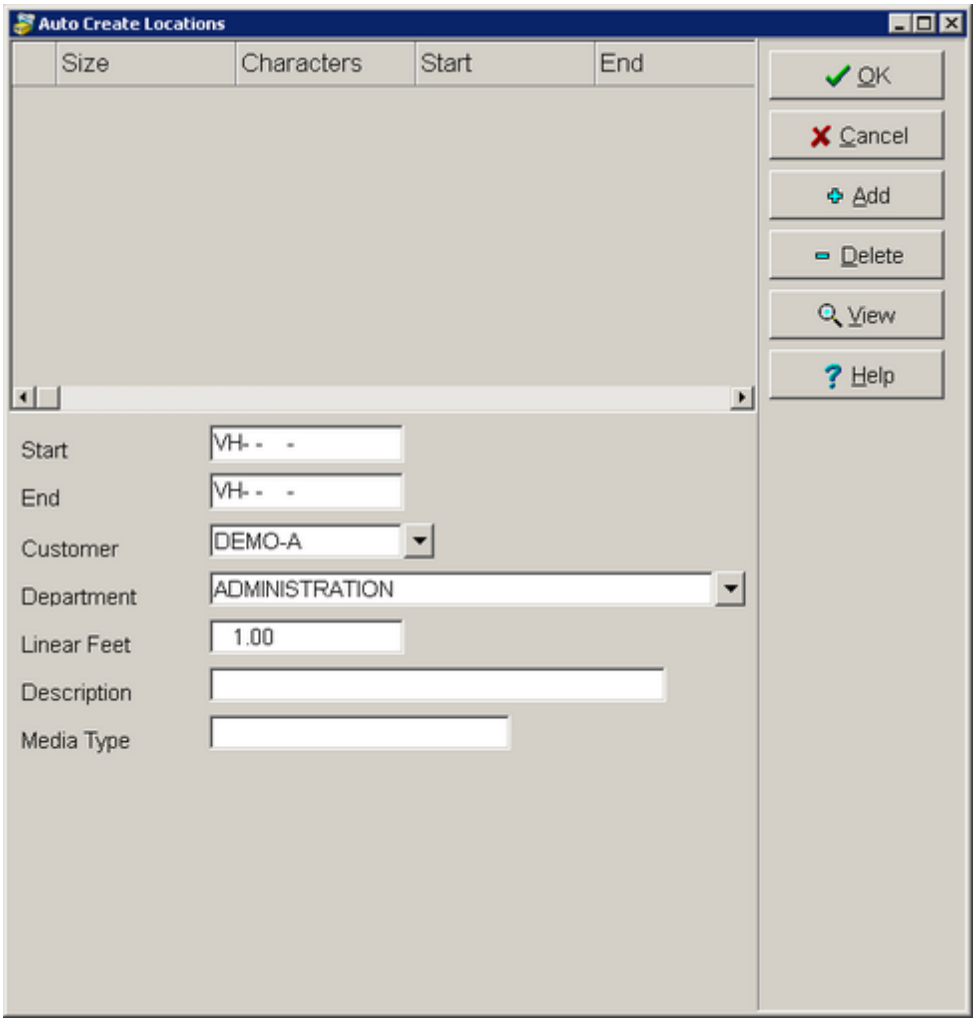
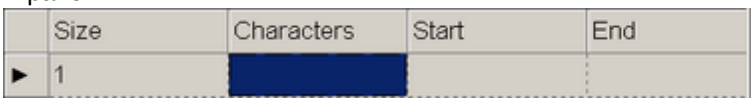


3. In the lower section, fill out the properties of the location (see field descriptions above).
4. Using the **Start** and **End** fields and upper panel, define the pattern for the locations to be created:

5. Beside the upper pane, click the **Add** button to add a segment. A segment is added to the top panel.



You will break the location addresses into segments and define the pattern for each segment.
Each segment should either be constant, or be established by a simple counting pattern.
For example, if all of the locations that you are creating are on the same picking level, (Say "01"), then the size of the first segment would be 2, the characters required would be (0,1), the segment would start at 01, and would end at 01.

Note that the "building" segment does not need to be specified, since you can only create locations for the building that you are in, therefore it will always be the same.

1. Click the value in the **Size** column twice to edit it. Enter the number of characters in the segment (eg. 2 for picking level.)
2. Click the value of the **Characters** column twice to edit it. This will tell the function how to count.

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For example, if you want to create aisle *A, B, C,* you would enter these characters. If you are creating even number shelves, a segment might use the characters *0,2,4,6,8*, in which case shelves 01, 03, etc would not be created with this operation.

3. Click the value in the **Start** column twice to edit it. (and you will do the same for **End**). Enter the start and end values for the segment to be used. (eg. if you are creating shelf 01 to 06, enter 01 for start, and 06 for end.)
4. Repeat for all remaining segments.

Once all all segments have been entered in this way, the total of the Size column should add up to the length of the location mask, minus the length of the building segment and the number of separator characters (eg, dashes.)

5. Click the **OK** button. The list of locations to be created, including the total count will be displayed.
6. Review this to ensure that it makes sense, then close the report.
7. A dialogue window will prompt "Confirm?". If you click **Yes**, the locations will be created.

If you run the Auto Create Locations function again from the same module window without closing it, the settings will be conserved. Repeat for the next batch of locations to create.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (*Start* and *End* fields) is the code of the building in question and cannot be changed.

Rules for auto-creation

In the following example, the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01 ... VH-0**4**01-01).
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :

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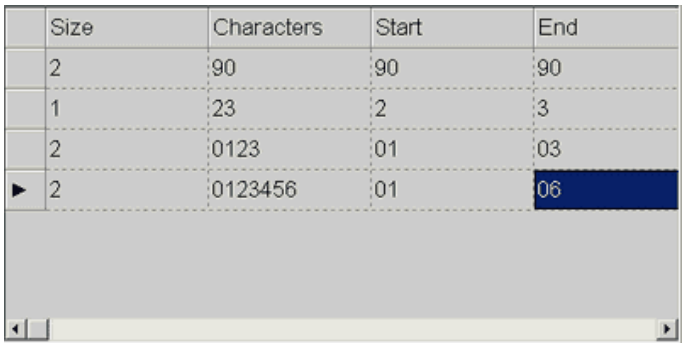

	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
▶	2	0123456	01	06

Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

The first time an inventoried file is placed on a shelf, the bar code of the file and the shelf location are scanned with the bar code reader. The current date is automatically put in the *Occupied Since* field of the present module and the billing for this shelf location is starting. But there is a problem when storing non track files, that represent the major part of documents stored on open shelf locations.

Since this document type does not have a bar code label, when storing a non track file for the first time on a shelf it is not possible to register the operation and to start the billing for the current shelf location. That is why the present operation was created, in order to allow the record center to manually indicate when a shelf location is used for the first time in that particular situation.

In the same way, the record center can manually indicate the final retrieval of all the non track files stored on a same shelf location, so that the storage fees must not be charged anymore.

1. Click on **Inventory**->**Shelf Location** from the *Main window*.
2. Search the shelf location to which the non track files are inserted or final removed.
3. Click on **Edit**->**Set EMPTY**|**Set OCCUPIED**. Accordingly to the operation that is performed, the system automatically puts the current date in the *Occupied Since* field or delete any date that

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was present in it.

Note : When there are documents left on the shelf location, it cannot be marked as being empty. It is necessary to transfer all these documents by creating an internal transfer list.

4.5.3.9 Setting up RimsLink

RimsLink facilitates partnership between record centers to offer customers multiple points of service through a single point of contact. For a given client, a *Billing* record center manages all financial interactions, while *Service* record centers provide additional storage and services. These are billed through the *Billing* record center.

Customers access ActiveWeb for the appropriate point of service (ie. the record center where the items they seek are) through a unified *web portal*.

Setting up and operating as the Billing record center for a customer

1. Deploy the ActiveWeb Portal 96 (This only needs to be done once at your record center).
2. Set up the customer account 86, using their regular billing contact information.
3. Set up the link to each Service record center 94, adding the customer to the list of shared customers.
4. Provide authorized users access to Service record centers 96
5. Map RimsLink Pricing 97 (can also be done immediately prior to invoicing)
6. Service the customer
7. Prior to creating the invoice, verify that all deliveries have been returned for the customer and period.If there are delays, it may be necessary to put this on hold on the auto selection until all *Service* record centers have completed their work.
8. Bill the customer
9. Pay *Service* record centers

Setting up to act as a Service record center for a customer

1. Set up the customer account 86, using the Billing record center billing information
2. Create a Billing record center password 98, and provide them with the necessary information
3. Submit invoice to the Billing record center

4.5.3.9.1 Adding, Editing, or Deleting Service Record Centers

At the Billing record center, the Service record centers and shared customers must be specified.

Open the list of Service Record Centers

1. Open the **Management->System Information** module.
2. From the menubar, select **Edit->Service Record Center**

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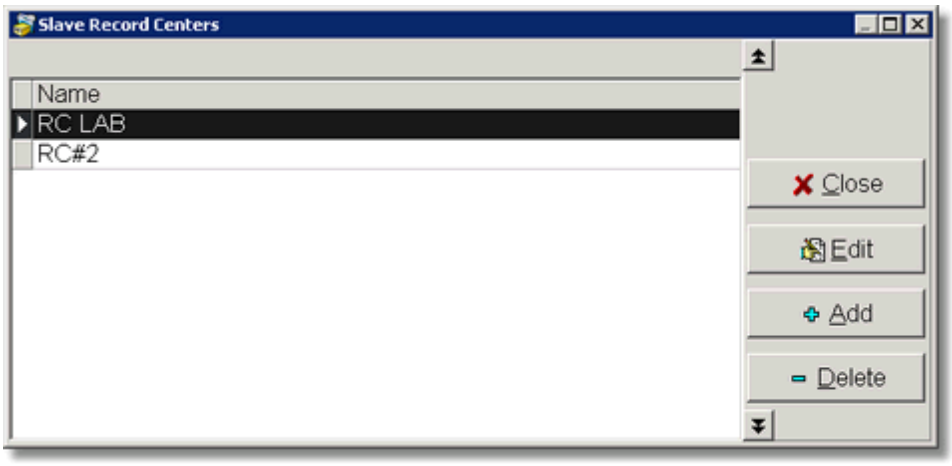
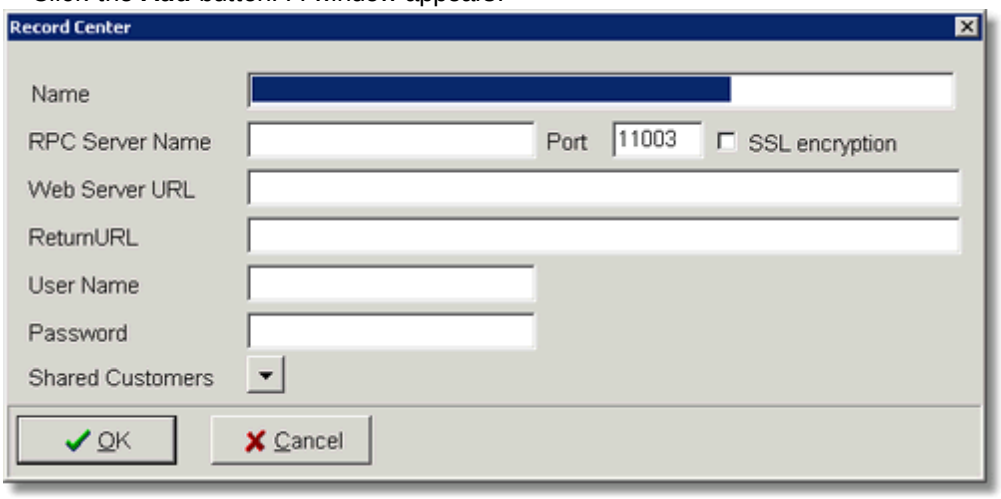


To add a Service Record Center to the list

1. Click the **Add** button. A window appears.



2. Fill out the fields:

Name: Used in the system and the ActiveWeb Portal to identify the Service record center
RPC Server Name: The URL of the Service record center RPC server (eg. myServiceRCDomainName.com, port, and whether or not SSL encryption is used.
Web Server URL: The URL of the Service ActiveWeb application. This is required for the ActiveWeb Portal.
ReturnURL: The URL that the customer will be returned to when they close the Service ActiveWeb application.
User Name and Password: User name and Billing record center password 98, provided by the Service record center.

3. Click on the **Shared Customers** button. A list of shared customers appears

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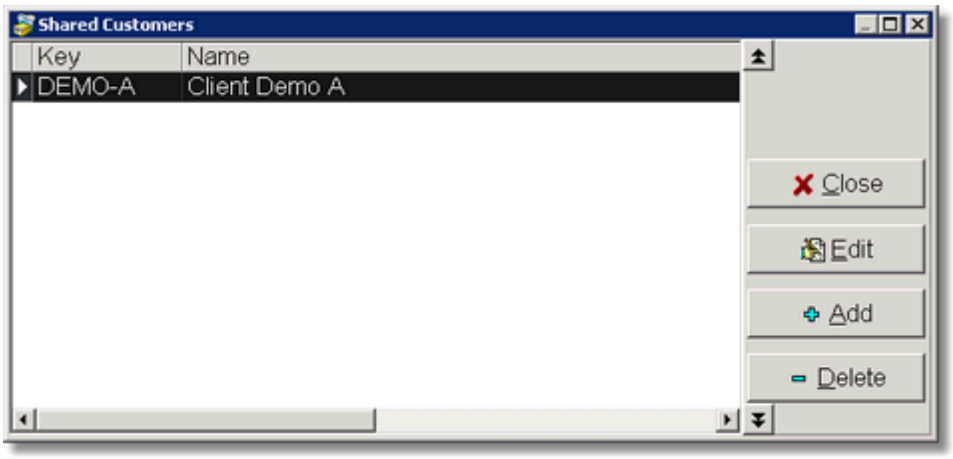
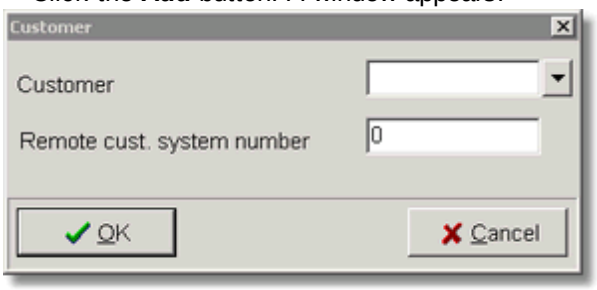


4. Click the **Add** button. A window appears.



5. In the customer field, enter or select the customer key of the customer used at the Billing record center
6. In the Remote cust. system number field, enter the system number[225] of the customer at the Service record center, which they can locate in their **Customer->Customer Information** module.
7. Click **Ok** when done.

You may now deploy the ActiveWeb portal[96], provide access to authorized users[96], and once invoices have been created to import from the Service record center, map RimsLink pricing[97].

4.5.3.9.2 Deploy RC Web Portal

The *ActiveWeb Portal* permits authorized users to access *ActiveWeb* for multiple record centers by logging on to a single page.

The *ActiveWeb Portal* can be deployed using a wizard. Detailed instructions are available in the technical manual. To access the wizard:

1. Open the **Management->System Information** module.
2. From the menubar, select **File->Deploy ActiveWeb Portal**.

Note that the customer must have a valid web license available at each record center that they wish to access electronically.

4.5.3.9.3 Provide authorized users access to Service record centers

Authorized users must be set up to access ActiveWeb[87] with the same *Login Name* and *Password* at each point-of-service record center.

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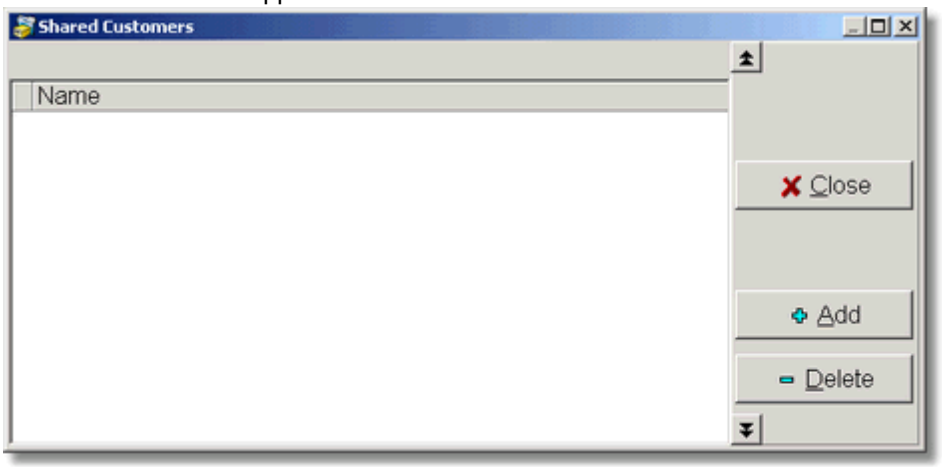
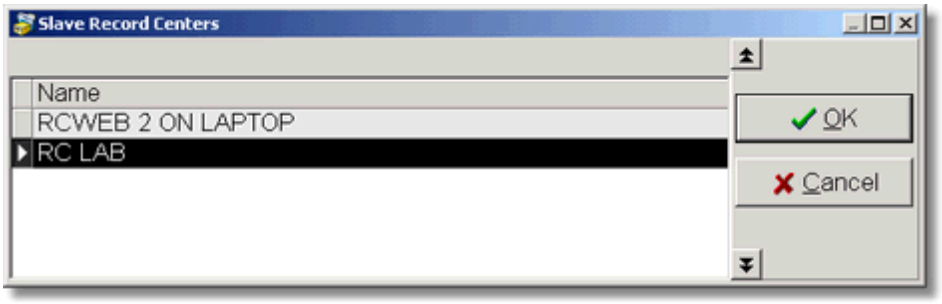
To specify which service record center locations authorized users can access,

1. Open the **Customer->Authorized User** module
2. Click the **Edit** button or press **Ctrl-Enter**.
3. Click the **Shared Customers** button to access the list of shared record centers that the user can access. A list appears



4. Click the **Add** button to access a list of service record centers



5. Select a service record center to add access to, then click the **OK** button.
6. Repeat steps 4 and 5 to add additional record centers.
7. Click the **Close** button when done adding record centers.
8. Press **Ctrl-Enter** or click the check mark to accept changes to the *authorized user* profile.

4.5.3.9.4 Map RimsLink Pricing

Billing and *Service* record centers may use different price codes for the same service. It is therefore necessary for the Billing record center to map the price codes used to their own.

To map price codes for a Service record center:

1. Ensure that at least one invoice exists at the *Service* record center for at least one shared customer.
2. Open the **Accounting->RimsLink Pricing** module. A list of Service record centers appears

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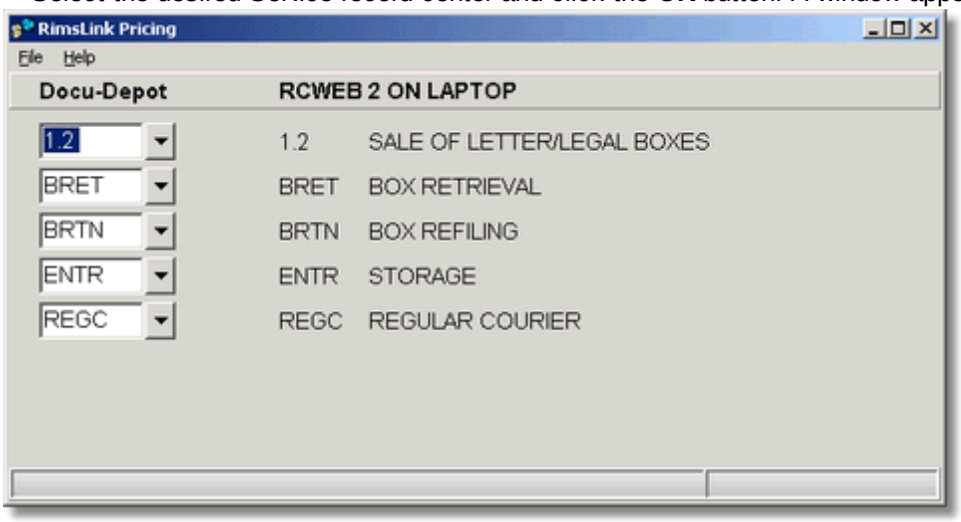
3. Select the desired Service record center and click the **OK** button. A window appears.



4. In the fields to the left, enter or select the *Billing record center* price codes to match the *Service record center* price codes to the right.
5. To map pricing for another record center, select **File->Open Service Record Center**.
6. Close the module when done.

4.5.3.9.5 Creating a password for the billing record center

A Billing record center password is a password issued by a Service record center to permit the Billing record center to access invoices for shared customers.

To create, modify, or delete a Billing record center password, the Service record center performs the following steps:

Open the Billing record center password list

1. Open the **Management->System Information Module**
2. From the menubar, select **Edit->Billing Record Center Passwords**. A list of Billing record center passwords appears:

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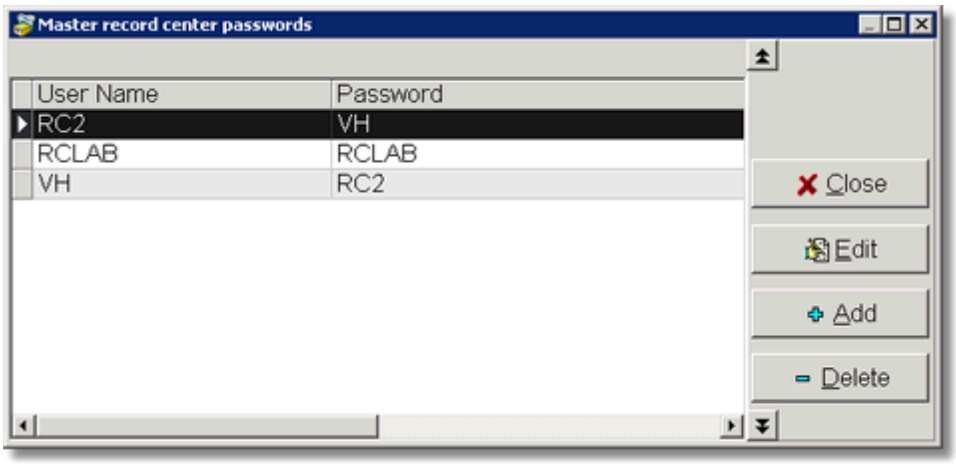
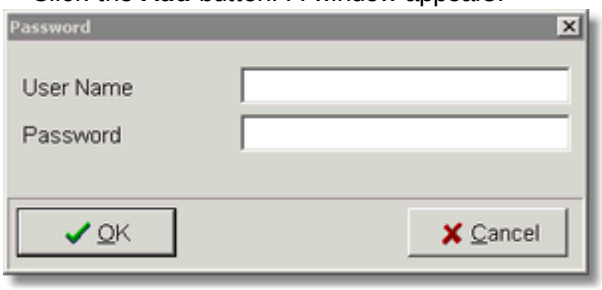


To add a password to the list

1. Click the **Add** button. A window appears:



2. Create a *User Name* and *Password*.
3. Click **Okay** or press the **Enter** key

To edit a user name or password on the list

1. Select the password to be modified
2. Click the **Edit** button
3. Overwrite the user name or password
4. Click **Okay** or press the **Enter** key

To delete a user name and password from the list

1. Select the password to be modified
2. Click the **Delete** button
3. Click **Yes** to confirm deletion of the password

4.6 Technical

Technical set-up is best done by a network administrator who is familiar with your network. Many technical topics are addressed in a separate document, *EDC RC Install and Technical Manual.pdf*, which can be found in the in the same folder as EDC RC (Docu32.exe).

However, you will want to make sure that the following topics are addressed:

Set-up step	Suggestion	Notes
Set up database engine on server		
Set up DSN		
Install EDC RC on server		
Configure services		

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Set-up step	Suggestion	Notes
Set up SMTP settings		
Set up ActiveWeb		
Configure local and remote back-up of EDC.		
Set up workstations 99 Including printers, PDT craddles, Document scanner, DSN for report access.		
Set up order checker on one or more workstations		

There are also several settings in the system information module that your network administrator can help you with:

Open the system information module in edit mode.

1 Click on **Management->System Information** from the *Main window*.
2 Click on **Edit->Edit**.

Field	Suggestion	Notes
Low disk space warning (MB)		Warns if the available space on the disk hosting the database drops below this amount. Hosting images and documents can take a lot of space.

***Replication**

Field	Suggestion	Notes
DocuData RPC server		services.docudatasoft.com :443
Client installation folder		Directory where the customer data will automatically be exported, when using the *ClientInstaller.exe* application.
RPC server at RC		External address (URL) for ActiveFile replication.
Internal LAN		Internal address for RPC server used for ActiveFile replication
Web RPC server		Internal address for for RPC server used for ActiveWeb

***Imaging**

Field	Suggestion	Notes
Image directory		Location for internal storage of images. This field can be set using the **Edit->Image directory** 216 function. Please contact DocuData support if you wish to change this.
Image server, port		Default port is 11000
Documents directory		Directory for use by the

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Field	Suggestion	Notes
		Electronic Document Management level of ActiveWeb, for storing the customers electronic documents. This folder may grow to occupy a lot of disk space.

***Record Center**

Field	Suggestion	Notes
SMTP Address, Port		
SMTP User Name, Password		
ActiveWeb URL		This is address of ActiveWeb on the internet. A link to this site is included in e-mail notification that imaging orders have been fulfilled
Invoice email BCC		You might want to set up a separate e-mail address for copying e-mailed invoices to.
Invoice email reply to		This should be a monitored e-mail, as it will catch delivery failure notices.

For additional details, see the *EDC RC Install and Technical Manual.pdf* mentioned above.

4.6.1 Setting up a new workstation

Record centers commonly add additional workstations or upgrade their hardware as they grow. This workstation must have network access to the server on which the EDC RC database and program reside.

Details are available in the **"EDC RC Install and Technical Manual"**, and additional resources are available through www.docudatasoft.com and knowledge-base articles at client.docudatasoft.com.

The key EDC-specific steps are as follow:

1. Install and configure the database engine. DocuData currently uses Pervasive for this purpose. The pervasive installer will guide you through this process.
2. Copy over a shortcut to start EDC RC (*docu32.exe*)
3. Add a DSN. The name is EDC_RC, and it should point either to the EDC RC data folder on the server. We typically name the database EDCRC.
4. For printing paper documents, ensure that your operating system's default windows printer is appropriate. This setting is taken from the operating system whenever you launch EDC RC.
5. Thermal printer and PDT communication port settings are taken from the *dc.cfg* file that can be specified in the shortcut used to start EDC RC. If this computer has a different configuration, you may wish to copy an existing folder in the Config folder of your EDC RC installation to create a new *dc.cfg* file to point at.

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5 Procedures and training manual

The following topics provide details on common procedures performed by a typical record center using EDC RC. They are intended for training purposes and as a guideline that can help you with your operations manual.

Because your own record center may be configured differently, it is important to test your own procedures and document them in your own operations manual 46, which will be your authoritative reference for procedures in use at your record center.

5.1 Training Introduction

Hello, and welcome to EDC RC. At DocuData we pride ourselves on the quality of our records management solution. This includes the software, the operational procedures it supports, the customer service tools that it enables, and also the quality of the partnerships that we have with you. Our general rule is that if it takes you more than 5 minutes to figure something out, send support@docudatasoft.com a quick e-mail, and we will be happy to help point you in the right direction.

Included with EDC RC is a minimum of one week of training. If you have a relatively small and focused team, training typically takes place in Montreal, Quebec, Canada, where we have access to the facilities and staff of a successful record center that has grown from a new use for an old storage building into a highly efficient company with a second state-of-the-art, purpose-specific building. If you have more staff that requires training as well as existing facilities that require analysis and onsite configuration, then our trainers may also come to you. Either way, we train you so that you are ready to run your business with EDC RC, and we continue to support you as you grow.

The purpose of this training section of the manual is three-fold.

1. To serve as an introduction for those prior to being trained on EDC
2. To serve as a review for those who have been trained, and a tool for helping to share this knowledge with new colleagues
3. To serve as a guideline in introducing new features as you grow, and as a resource in building your own operations manual.

Note that EDC is very flexible and can accommodate many different operational methods. This manual will describe one method, in order to illustrate fundamental concepts. Your record center should have its own internal operations manual that you should follow for existing procedures.

If you are trying out a new procedure, we strongly recommend working with your demo customer account in order to verify that you will achieve the desired effects given your own unique configuration.

5.2 Getting Started

EDC RC requires users to log in using their employee profile. This will determine which modules and rights they have access to, and will permit the system to keep track of who performed which operation such as performing data entry or taking an order over the phone.

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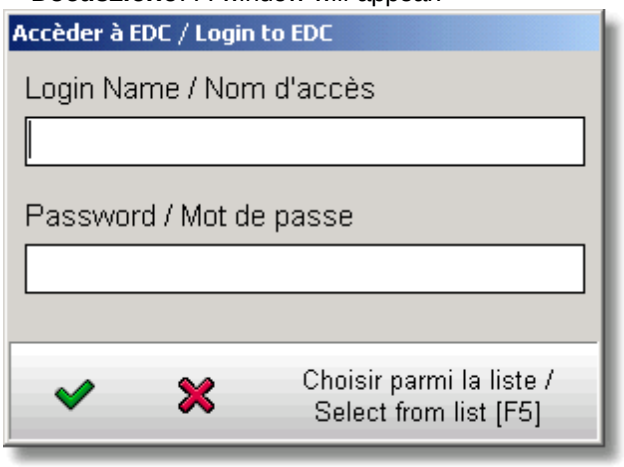
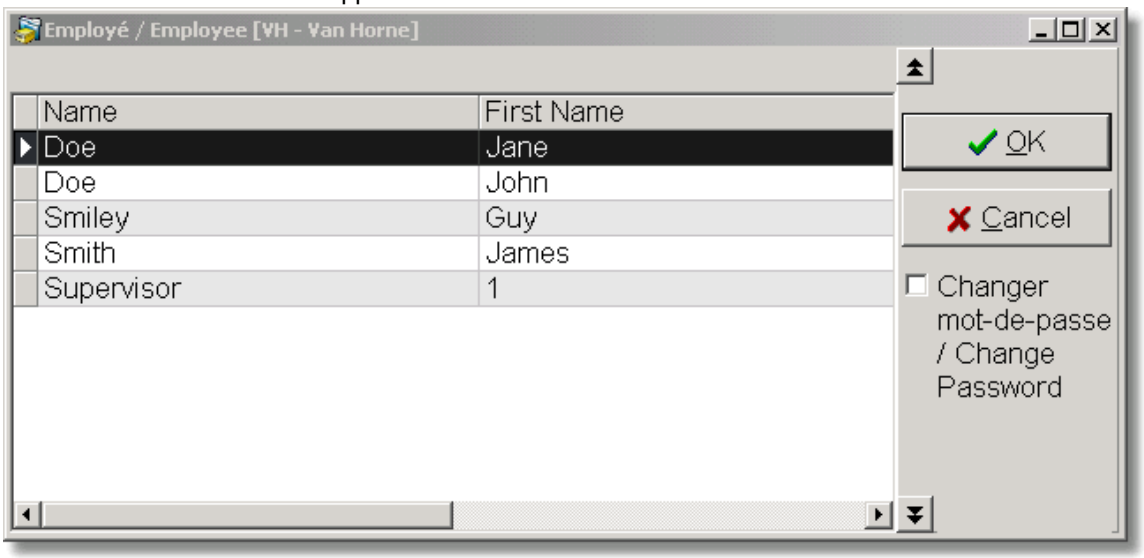
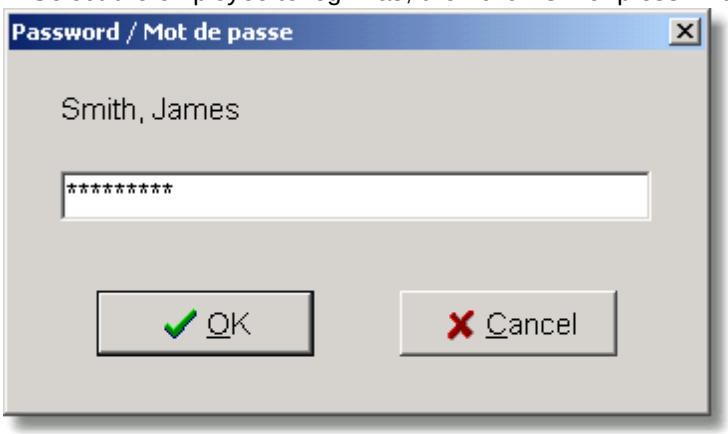
1. If a login window is not already present, double-click the box and file shortcut to activate **Docu32.exe**. A window will appear.



2. Type the login name and password and press enter, or press the F5 key to select from a list, in which case a window will appear.



3. Select the employee to log in as, then click **OK** or press **Enter**. A window will appear



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4. Enter the password, then click **OK** or press **Enter**. If the password is correct, you will arrive at the *Main Window* of EDC RC.

Trouble-shooting

- If the EDC RC icon is absent from your workstation, have your system administrator install it for you. Instructions can be found in the Technical Manual.
- If you encounter an error message before the login screen appears, have your system administrator determine whether Pervasive is properly installed on your workstation.
- If you encounter a long delay while waiting for the login screen, have your system administrator verify that you have enough licenses for Pervasive. Closing EDC RC on a computer that is not in use may resolve this.
- If your profile does not appear in the list of employees authorized to access EDC RC, have your supervisor verify that you have a profile and that it has not expired. Note that repeatedly entering incorrect passwords will cause your profile to expire.

5.3 How to use the PDT

5.3.1 Overview (PDT)

Built to collect, display and communicate data, the PDT is used in most of the operations (ex: picking, refiling, moving and delivering items). Two PDT models are supported by ***EDC***: the PDT 3100 (by Symbol) and the PHL 2700 (by Opticon). The PDTs are also compatible with the O'Neil microflash portable printer.

Note : Employees log on to the PDT by scanning their employee bar code 172. This permits EDC to track when and by whom each box and file was processed.

Operations

- General points about the PDT 104
- Picking items with the PDT 133
- Delivering items with the PDT 138
- Returning or adding items with the PDT 138
- Refiling items with the PDT 145
- Moving items with the PDT 108

5.3.2 General points about the PDT

Useful keys

- **CLEAR/ESC** Return to the main menu
- **BK SP** Delete characters
- **SPACE/SP** Insert space between 2 characters

Selecting a menu, a sub- menu or a function (menu item)

Menu and sub-menus

The menus and the sub-menus are displayed vertically and are preceded by a number (ex : **1-Receive lists**, **2-Send results**, etc). To select a menu or a sub-menu, it is only necessary to press the key of the related number.

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Functions

Functions (menu items) are displayed on the same line in an abbreviated form and are also preceded by a number (**1Prv**, **2Nx**, etc). The functions are accessible when a menu and a sub-menu have been chosen and when an item is being processed. To activate a function, it is only necessary to press the key of the related number. In some situations, it can be necessary to press also the **ENTER** key.

Main menus and sub-menus

MENUS

1 - Receive : allows to download data from a workstation to the PDT.
2 - Send results : allows to upload to a workstation data that has been processed with the PDT.
3 - Processing : allows to process data that has been or will be uploaded to the PDT.
4 - Utilities : allows to view the information about the PDT, to reset deliveries, to define the number of scans, to test the bar code reading, to select a mode of communication, to select a bar code type and to select a printing mode.
5 - Log out : allows to log out from the PDT and to login has a new user by scanning the personal bar code 172 (defined in the *Employee* module).

SUB-MENUS (when selecting *Processing* or *Send Results* in the main menu)

1 - Picking : allows to pick items.
2 - Refile : allows to refile items.
3 - Move : allows to move items.
4 - Delivery/Ret : allows to deliver or to return items, as well as add new boxes and files.
5 - File refile : allows to refile inventoried and non track files.
6 - Truck Val. : allows to perform a truck validation
7 - Pallet Pick. : allows to pick a pallet (when using By-Pallet destruction 149)
8 - Pallet Verify : allows to verify a pallet (when using By-Pallet destruction 149)

The lists and the list items

Display of the lists

The lists downloaded and processed with the PDT are displayed vertically and are split into 4 columns.
The 1st column indicates the number granted to the list which allows the selection of that list.
The 2nd column indicates the floors (or sections) where the items are located.
The 3rd column indicates what types of items are present on the list (B : box or tape - F : file - OS : open shelf file, etc).
The 4th column indicates how many items are contained on the list.

Indications of the list items

- Box (or tape) : location/customer code/box (or tape) number/RC number of the box (or tape).
- Inventoried file : location/customer code/box number/RC number of the file.
- Non track file : location/customer code/box number/RC number of the non track.
- Open shelf file : location/customer code/RC number of the file.

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5.3.3 PDT Utilities

This menu is particularly useful to perform tests on the PDT, to correct mistakes and to set options.

Viewing the information of the PDT

The information about the PDT is organized in a certain way: the first line refers to the version of the PDT (ex: V 2.16); the second line gives the current date and time, and the third line gives the amount of memory that the PDT contains.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Information* sub-menu (**1- Info**)

*Resetting a delivery

This sets the items of a delivery as 'not delivered'. This was made so that drivers could do a verification without using the truck validation. The driver would scan the items on his truck (See Delivering items with the PDT 138) to make sure everything was there, arrive at the client's facility, reset the delivery and rescan the delivery items.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Reset Delivery* sub-menu (**2- Reset Delivery**)
3 Enter the delivery number and press **Enter**.
4 The delivery will automatically be reset.

Defining the number of scans

The number of scans a PDT performs defines the margin of error; example, if a PDT verifies a bar code twice, then the margin of error will be smaller than if the PDT only verifies the bar code once. In brief, it means that the PDT will compare the two scans before accepting the item as the right one.

Note: The amount of time the PDT takes to scan will not change drastically, since the verification is very quick.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Scan count* sub-menu (**3-Scan count**)
3 Enter the number of scans (choose a number between 1 and 2).
4 The number of scans will automatically be changed.

Testing the bar code reading

This option is useful when testing the PDT to see if it can read the different bar codes.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Scan count* sub-menu (**4-Read bar code**)
3 Read the bar code and compare the bar code displayed on the screen with the bar code you have just scanned.

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Show alternate location label

This option is useful is you are transitioning from one location addressing scheme to another. Note that it is possible to toggle back and forth between showing the different location labels even after picking lists have been downloaded to the PDT.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Show Alt Location* sub-menu (**4-Read bar code**)
3 Press **1** for *Yes* if you wish to display the alternate location, **0** for *No* if you wish to display the EDC location.
4 When they exist, the alternate location will be displayed instead of the EDC location.

Setting the bar code symbology

This option is only useful when the record center has alternate labels with the '2 of 5' bar code symbology, by default, EDC uses the '3 of 9' symbology. This enables the user to select the length of the bar codes used (PHL2700 only).

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Min 2of5 length* menu (**5-Min 2of5 length**)
3 The default used for the length of the bar code is 6. To change that length, enter the new value (*Ex:* 7) and press **Enter**. The PDT goes back to the main menu.

Selecting a mode of communication (only for PHL 2700-80 model)

This option is mainly used when the mode of communication needs to be changed often (if the facility has cables and cradles at its workstations) or for the initial set up of the PDT. Also, when the batteries are changed, the PHL is set for cable communication by default, so one needs to set this parameter, especially if the communication is mainly done with cradles.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Cradle/Cable* menu (**6-Cradle/Cable**)
3 Press **(1)** and **Enter** to choose the communication by Cradle and **(2)** and **Enter** to choose the communication by Cable.

Note: The default is always set to **Cradle** communication.

Setting the printer communication mode

This option is only of assistance when the portable O'Neil printer is used. It enables you to set the communication mode of the printer, whether it is via cable or infra-red port (PHL2700 only).

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Min 2of5 length* menu (**7-Print IrDa/Cable**)
3 To select the communication via infra-red port, press **(1)** and **Enter**. To select the communication via cable, press **(2)** and **Enter**.

Note: The default is always set to **Cable** communication.

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5.3.4 Moving items with the PDT

Moving items

Items are moved from one location to another in the warehouse using the PDT to track move lists.

Routine moves are uploaded to the Return verification module. Larger moves may be performed using the Internal Transfer List module, while moves between the warehouse and the vault must be uploaded as Vault Transfers in the Box and File Maintenance module.

1. Select **3-Processing->3-Move**.
2. Select **4-OnShelf** if you want to move boxes or open shelf files, **5-InBox** if you want to move files.
3. Scan the bar code of the new location, then scan all the items to be transferred in that location.
4. When the last item for the location has been processed, scan the new location again to close it.
5. Repeat steps 3 and 4 while moves of this type remain.
6. Select **0 (Qui)** to quit.
7. Upload the move list to the appropriate module in EDC RC by selecting 2-Send results->3-Move.

- Routine moves are uploaded to the Return Verification module (see the section "Uploading a move list from the PDT 563")
- To move items between regular storage and vault 497, or resize boxes 497 that have previously been sized, use the appropriate option in the Box and File Maintenance module.
- Special functions are also available for uploading move lists when processing an internal transfer lists (See "Transferring documents from a location to another 439"), and when rescanning the warehouse in order to correct inventory (see the section on "Uploading a Rescanning move list 460").

Note: It is possible to move a box or an open shelf file from one transit location to another.

5.4 Order processing

5.4.1 Outgoing and incoming items

Many of the daily operations at a record center revolve around the movement of box and files in response to customer orders. Between the creation of a record and its ultimate disposal, it may pass through various states, as illustrated in the following diagram.

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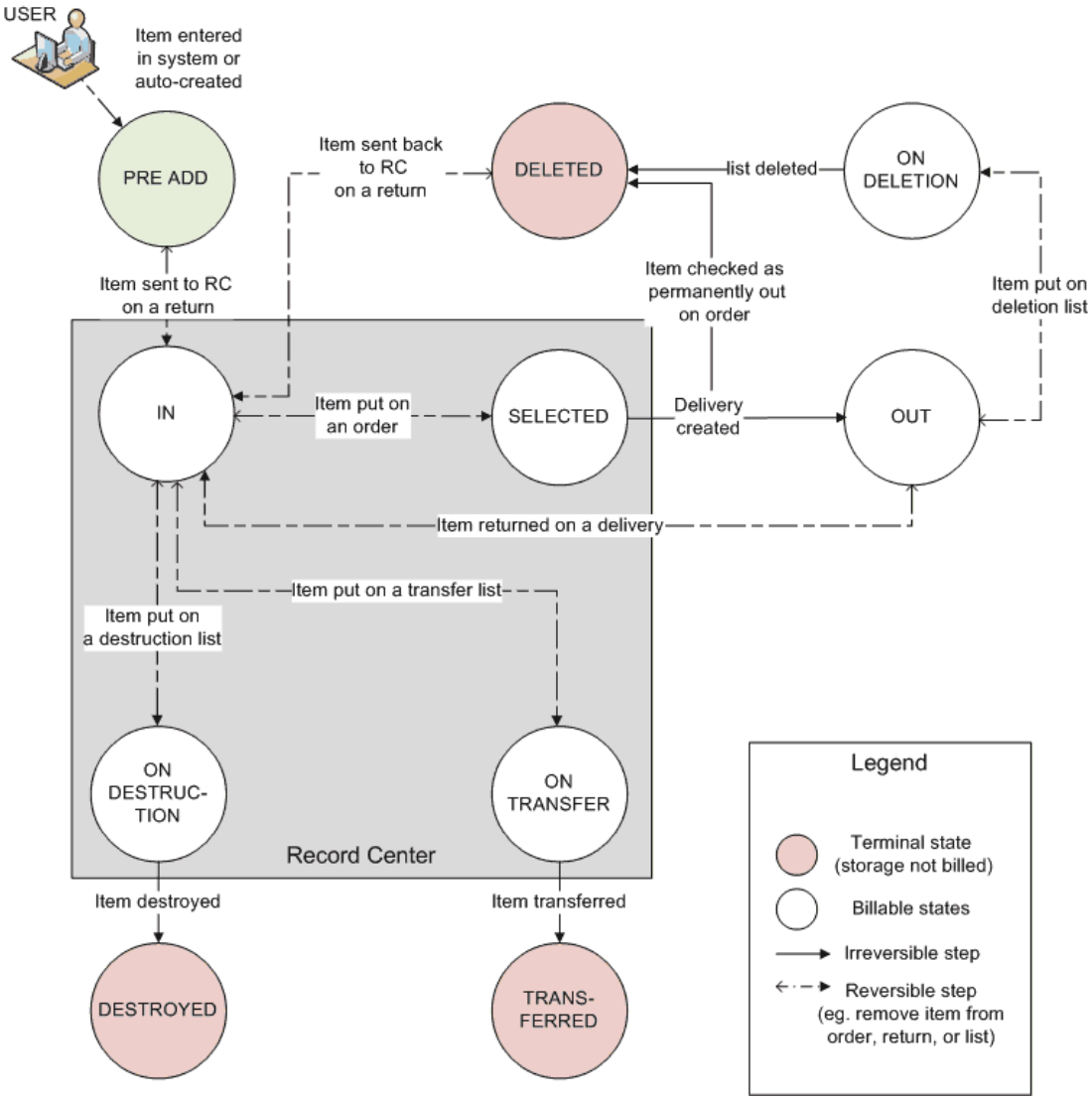

Circulating states

State	Description
PREADD	New items that have records in EDC but have never been in the record center (or processed in-house by a customer with ActiveFile) are in the *PRE ADD* state Record centers frequently issue pre-printed thermal labels for customers to affix to their new boxes by auto-creating boxes in PRE ADD[481], creating box records that customers can then modify through ActiveFile or ActiveWeb.
IN	When the item are brought into the record center on a return, the state is changed from PREADD or OUT to IN. Items that are in the record center must have a location. Items coming from PREADD acquire the size (box type) of the first location that is not a transit location that they are moved to.
SELECTED	When an item is placed on an order it becomes SELECTED,

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State	Description
	to prevent duplicate orders.
OUT	The status of an item selected on an order changes to OUT when the associated delivery is closed. Items that are OUT have a recipient.

Terminal States, and states leading to them

State	Description
ON TRANSFER	If items are to removed from inventory and transferred permanently to another location, their state becomes "ON TRANSFER" when placed on the list, and "TRANSFERRED" once this list is processed.
TRANSFERRED	
ON DISPOSAL	If items that are in the record center are to be destroyed, their state becomes "ON DISPOSAL" when placed on the list, and "DESTROYED" once this list is processed.
DESTROYED	
ON DELETION	If items that are OUT are to be removed from inventory, their state becomes "ON DELETION" when placed on the list, and "DELETED" once this list is processed. Items may also be deleted by checking the "Permanently Out" option while placing an order. Deleted items may be accepted back into inventory if they are return to the record center.
DELETED	

5.4.2 Order processing overview

The basic work flow for orders and deliveries in EDC RC pass through the following 10 steps, each of which may have a variety of options. We will go into each in more detail in subsequent topics. It is worth noting that in EDC RC, orders and deliveries are separated. An order is a request by a customer: a delivery is the provision of service to the customer. Several orders may be grouped into a single delivery.

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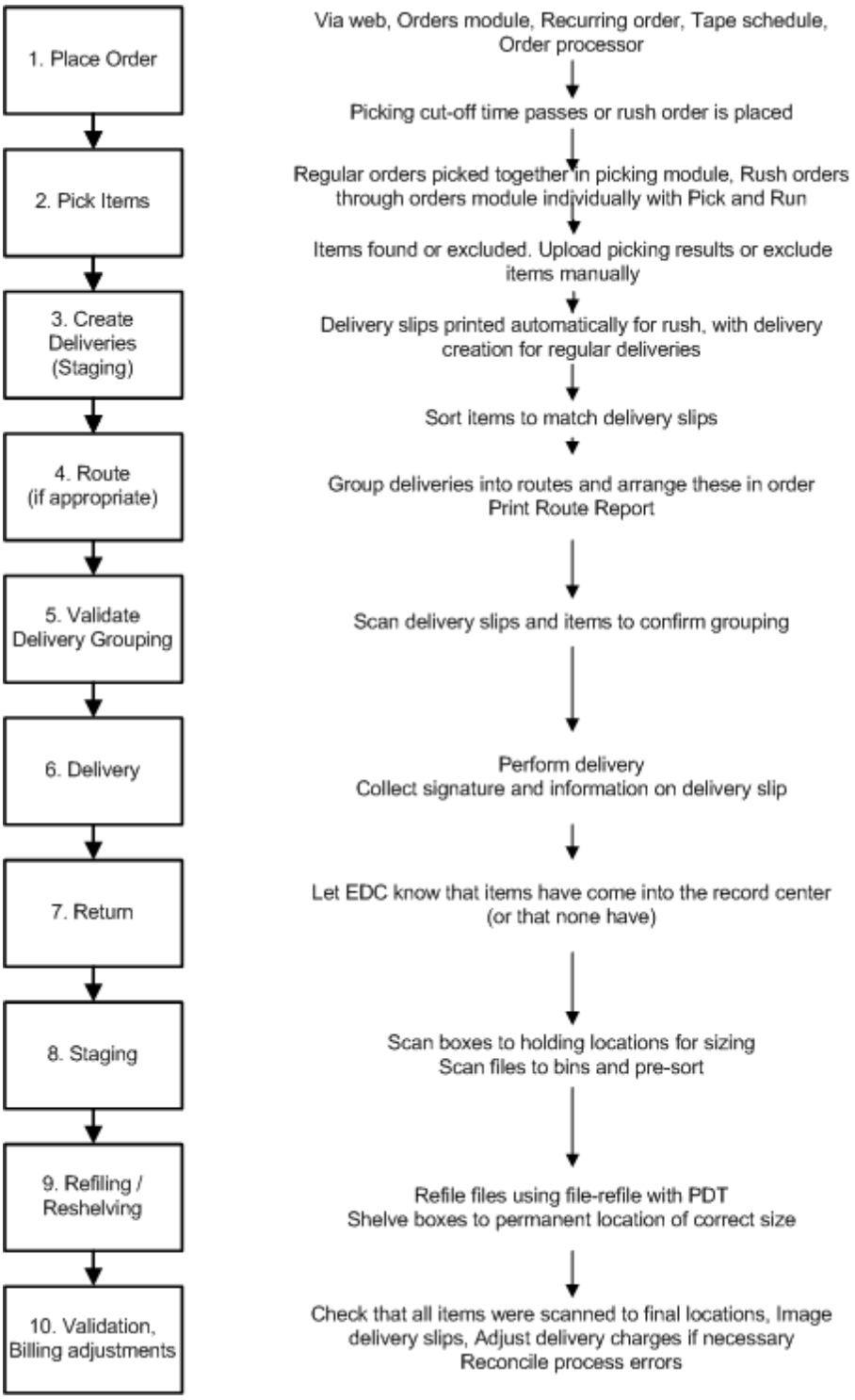
1. Place Order
Via web, Orders module, Recurring order, Tape schedule, Order processor
2. Pick Items
Picking cut-off time passes or rush order is placed
Regular orders picked together in picking module, Rush orders through orders module individually with Pick and Run
3. Create Deliveries (Staging)
Items found or excluded. Upload picking results or exclude items manually
Delivery slips printed automatically for rush, with delivery creation for regular deliveries
4. Route (if appropriate)
Sort items to match delivery slips
Group deliveries into routes and arrange these in order
Print Route Report
5. Validate Delivery Grouping
Scan delivery slips and items to confirm grouping
6. Delivery
Perform delivery
Collect signature and information on delivery slip
7. Return
Let EDC know that items have come into the record center (or that none have)
8. Staging
Scan boxes to holding locations for sizing
Scan files to bins and pre-sort
9. Refiling / Reshelving
Refile files using file-refile with PDT
Shelve boxes to permanent location of correct size
10. Validation, Billing adjustments
Check that all items were scanned to final locations, Image delivery slips, Adjust delivery charges if necessary
Reconcile process errors

To help you keep track of how far along in the process each order is, the orders and deliveries progress through different states as follows:

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<table>
<tr><th>Action</th><th>Outgoing items status</th><th>Incoming items status</th><th>Order status</th><th>Delivery status</th></tr>
<tr><td>Request placed for barcode labels (order is placed and barcodes are printed)</td><td>PRE ADD</td><td>N/A</td><td rowspan="2">(Has a number)</td><td rowspan="3">N/A</td></tr>
<tr><td>Orders placed to pickup boxes from the client</td><td>N/A</td><td>OUT or PRE ADD (customer site)</td></tr>
<tr><td>Orders placed to deliver items to client</td><td rowspan="2">SELECTED</td><td rowspan="4">N/A</td></tr>
<tr><td>Pick</td><td>BEING PICKED</td></tr>
<tr><td>Delivery creation (picking incomplete)</td><td rowspan="6">OUT</td><td>GROUPED</td><td>CREATED (repeat delivery creation to close.)</td></tr>
<tr><td>Delivery creation (picking complete)</td><td rowspan="5">Affected orders are CLOSED</td><td>CLOSED</td></tr>
<tr><td>Truck validation</td><td rowspan="2">ON TRUCK</td></tr>
<tr><td>Delivery and Return of items with PDT</td><td>OUT or PRE ADD (customer site)</td></tr>
<tr><td>Return of items</td><td rowspan="3">IN</td><td rowspan="2">RETURNED</td></tr>
<tr><td>Moving files to transit locations and boxes to holding locations</td></tr>
<tr><td>Refiling items</td><td>VERIFIED</td></tr>
<tr><td>Refiling verification</td><td>If some items have not been scanned to a final location, the delivery will remain RETURNED status</td></tr>
</table>

* grey background indicates actions or items may be at the customer site.

5.4.3 Order entry operations

The circulation process starts with the creation of orders. Orders will be assigned a delivery date and time based on the delivery type chosen.

It is worth noting that deliveries and orders are separate concepts in EDC RC. Unless the option to group orders is turned off, multiple regular and by date orders for the same delivery cycle and delivery address may be grouped onto a single delivery at the time of delivery creation if the delivery types use the same price codes. Therefore, if a customer calls back and requests more items, you may simply place a second order.

Orders may be created in several different ways.

1. Through the order module in EDC RC 114
2. By the customer (or the record center) via ActiveWeb. (See ActiveWeb documentation)
3. By the customer through the order module of EDC ActiveFile (See ActiveFile documentation)
4. By a recurring order 125
5. By a rotation schedule 128
6. Through an electronic submission to the EDC RC order processor. (Contact support@docudatasoft.com)
7. Through the "Daily Returns" option for a delivery address 302 (Rarely used)

No matter how orders are entered, they will appear in the orders module, and they will be treated similarly in picking and subsequent steps.

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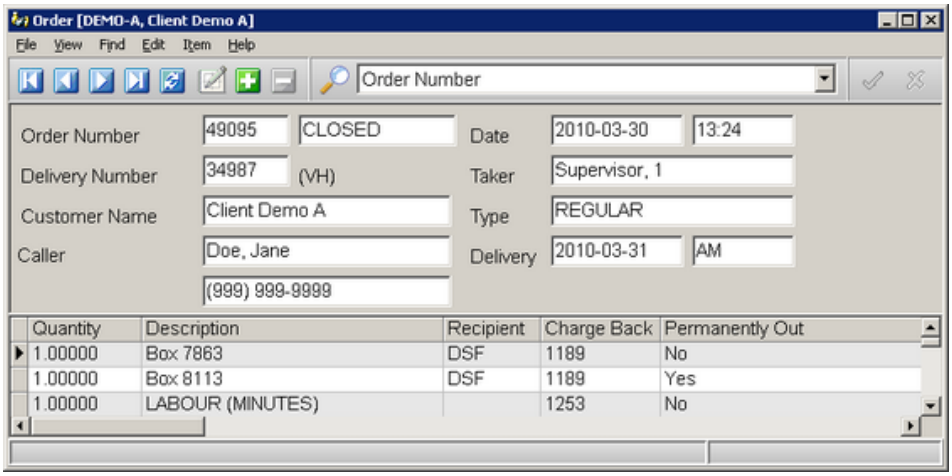
5.4.3.1 Introduction to the Order module


Order [DEMO-A, Client Demo A]
File View Find Edit Item Help
Order Number
Order Number 49095 CLOSED
Delivery Number 34987 (VH)
Customer Name Client Demo A
Caller Doe, Jane
(999) 999-9999
Date 2010-03-30 13:24
Taker Supervisor, 1
Type REGULAR
Delivery 2010-03-31 AM
Quantity Description Recipient Charge Back Permanently Out
1.00000 Box 7863 DSF 1189 No
1.00000 Box 8113 DSF 1189 Yes
1.00000 LABOUR (MINUTES) 1253 No

The order module is the first module on the Orders tab. When first opened, it opens to the most recently placed order, in browse mode.

Fields	Notes
Order number	Order numbers are sequential and automatically assigned by the system. To the right, the status field may be blank (created), *being picked*, *grouped*, or *closed*. Orders in the blank (created) state can easily be deleted. Once work has begun, the order cannot be deleted, but you can exclude items and cancel charges.
Date	The order date and time are stamped when the order is accepted (terminated.)
Delivery number	Assigned when the delivery is created. Note that this number will generally be lower than the order number, as multiple orders may be grouped onto one delivery. (To the right, in brackets, is the building number associated with the delivery.)
Taker	This indicates how the order was placed. If it was entered through the order module, this will be the employee who was logged in. If it says "Customer", this indicates that the order was placed directly by the "Caller". Other options include "Recurring Orders".
Customer name	Name of the customer account.
Type	Delivery type
Caller	Name of the Authorized User
Delivery	Scheduled delivery date and time.
(unlabeled)	Phone number of the authorized user. Note that the presence of a yellow watch icon to the left of this field would indicate that the order was processed using the "Pick and run" function.

Columns	Notes
Quantity	This area list items on the order, and various parameters related

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Columns	Notes
Description	to those items.
Recipient	
Chargeback	
PermOut	

Related topics

Placing an order in EDC RC 114
Overview (Order) 501
Fields (Order) 503
Entering an order 504
Entering a purchase order 505
Entering a fast order 506
Picking and delivering an order immediately 508
Adding items to an order 509
Adding special instructions to an order 520
Editing an order 521
Edit Perm Outs 522
Deleting an order 523
Printing thermal labels 524
Viewing information about the current order 524
Viewing or printing reports 525

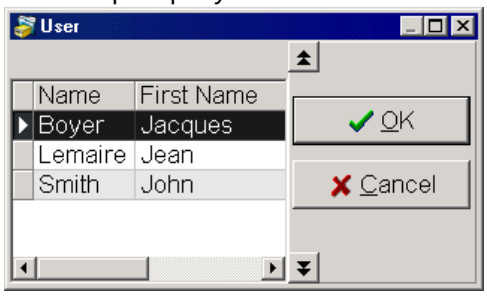
5.4.3.2 Placing an order in EDC RC

To create an order in EDC RC, follow the steps below. Adding items to an order is discussed in the following topic, since there are many different options to consider.

1. Open the **Orders->Order** module.
1. Click on **File->Create Order**, or press the **Insert** key. A window prompts for the customer.
2. Enter the customer key and press **Enter**, or leave blank and press **Enter** to select the customer from a list.

- (A window pops-up if the customer has ordering notes; read the notes and press **OK**.)

3. A window prompts you to select an authorized user.



4. Select the appropriate user and press **OK**.

- If the user has a password assigned and the option "Don't ask for password at RC" is not selected in the Authorized User 280 module, a window prompts for their password.

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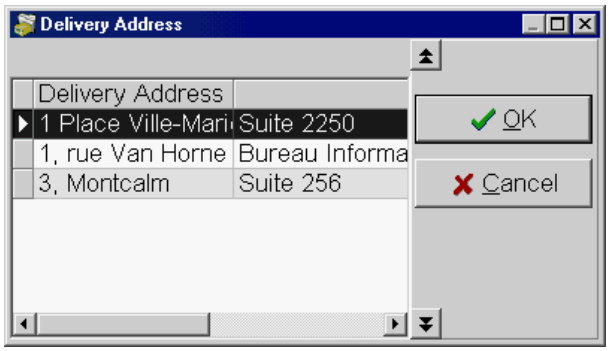
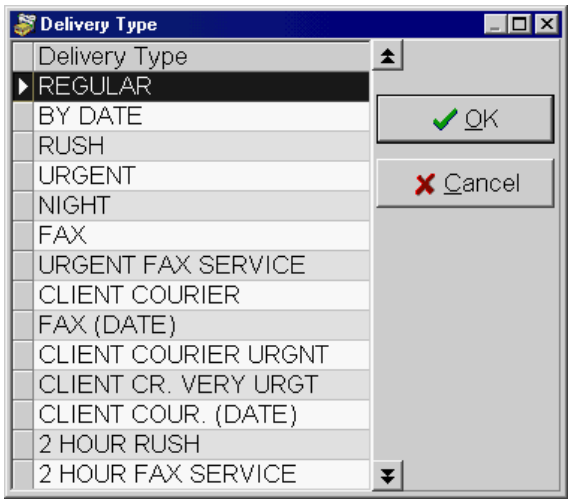
5. Enter the user's password and press **OK**. A window appears listing Delivery Addresses[302] that the authorized user has access to.



6. Select a delivery address and press **OK**. A window is displayed with delivery types[621] that the authorized user has access to.



7. Select a delivery type for the order and press **OK**.
8. Add the desired items (see "Adding items to an order[114]" for more details)

9. Press **Ctrl-Enter** to *terminate* entry for this order. This is equivalent to selecting **File->Terminate order**, or clicking Click on the **Accept** button.

Note: When order entry is terminated, EDC RC assigns the order an order time and delivery date, and the items appear on the picking list for that delivery period. Terminating the order before the picking cut-off is therefore very important.

Related topics
Entering an order[504]

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Adding items to an order 116

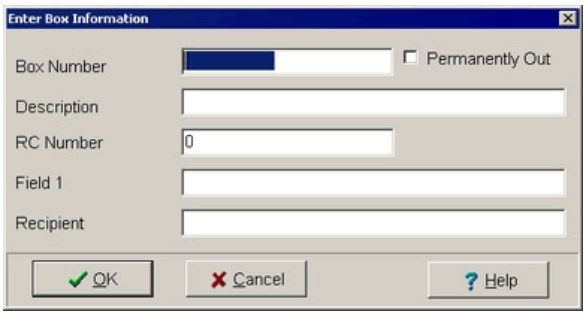
5.4.3.3 Adding items to an order

There are many options available for adding items to an order. Familiarize yourself with the methods for ordering individual file and box retrievals, line items, and returns.

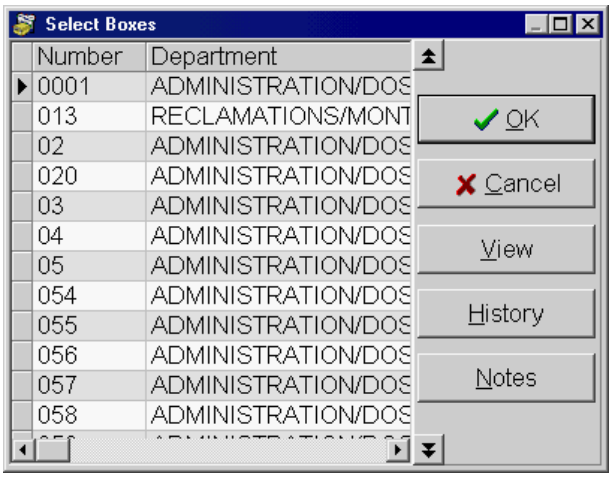
The more advanced options are used less frequently. (for example if a customer wants to order all items meeting certain criteria, you could to this using a search, or if they provide a list of box numbers in an e-mail, you can paste in this list). Once you are familiar with the basics of ordering an item, and are familiar with EDC RC in general the other options will become more intuitive.

Adding a box retrieval

1. Click on **Item->Add Item->Box Retrieval**. A window appears.



2. Enter a recipient (required). Enter value for the box number, description, RC number, or Field 1, and press **OK**. A list of boxes will appear, positioned to the specified value, sorted by the specified field.



3. Highlight the desired boxes and click on the **OK** button.

Adding a file to an order

1. Click on Item->Add Item->File Retrieval. A window appears.

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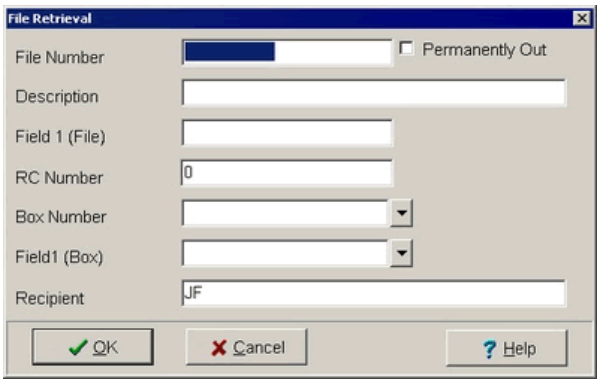


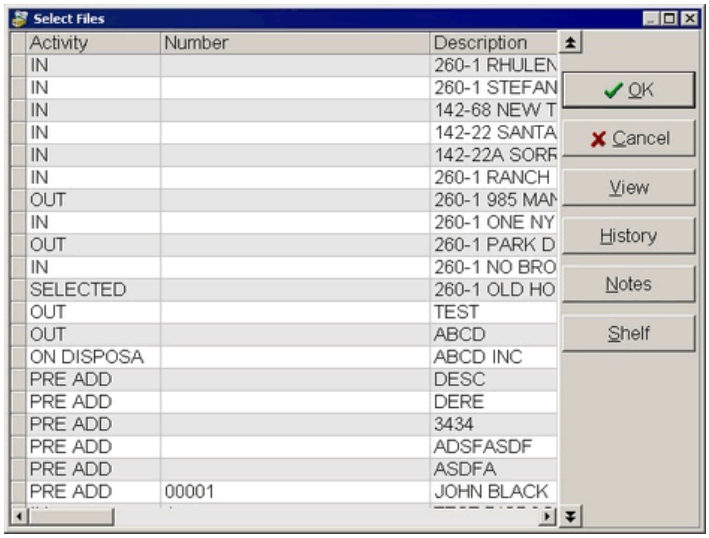
2. Enter a recipient
3. Specify the file

By File RC number:

- If have the file RC number is known, enter it and click **OK** to add it to the order.

By file number or description:

- If the file number or description is know, enter that information and click **OK**. A list of inventoried files appears. Highlight one or more files and click **OK**. They will be added to the order.



- If the file is stored open shelf and is not inventoried, click on the **Shelf** button. A window appears with criteria for specifying open shelf files.

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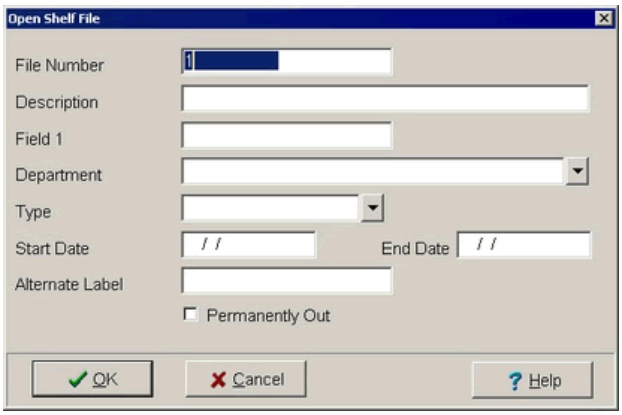
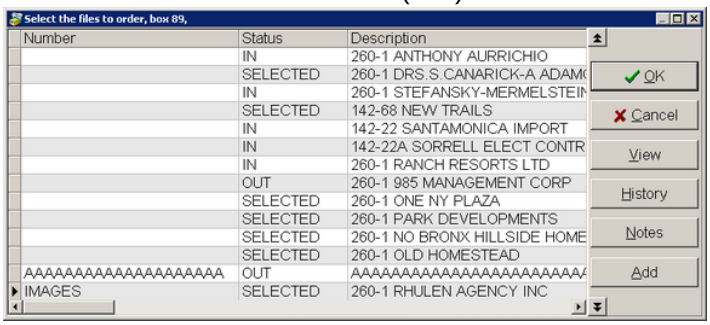


1. Enter the desired information in the appropriate fields (one must enter at least the department and the type of the file) and press **OK**. The file is added to the order as an auto-inventoried file[727]. You are returned to the list of files, with the added file selected.
2. Click **OK** to add the file to the order.

By box:

- Enter the box number or Field 1 (Box) and click **OK**. A list of files in that box appears.



- If the file exists, highlight the file and click **OK**.
- If the file has not been inventoried but the customer wishes for you to search in the box, click the **Add** button to create an auto-inventoried file[727]. In the window that appears, enter the file number, description, and/or field 1, then click **Ok**.
- You are returned to the list of files in the box, with the new file selected. Click **Ok** to add the file to the order.

Note: Because several files can have the same number and description, click on the View button to open the detailed report and see the RC number, in order to be sure that the right file is ordered.

Note: Auto inventoried files in boxes can only be added to an order if the box has been specified.

Adding a quantity of return items

1. Click on **Item->Add Item->Returns->Not Specified**. A window appears.

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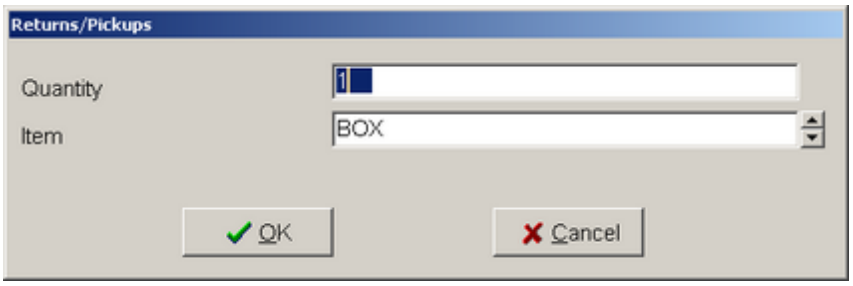


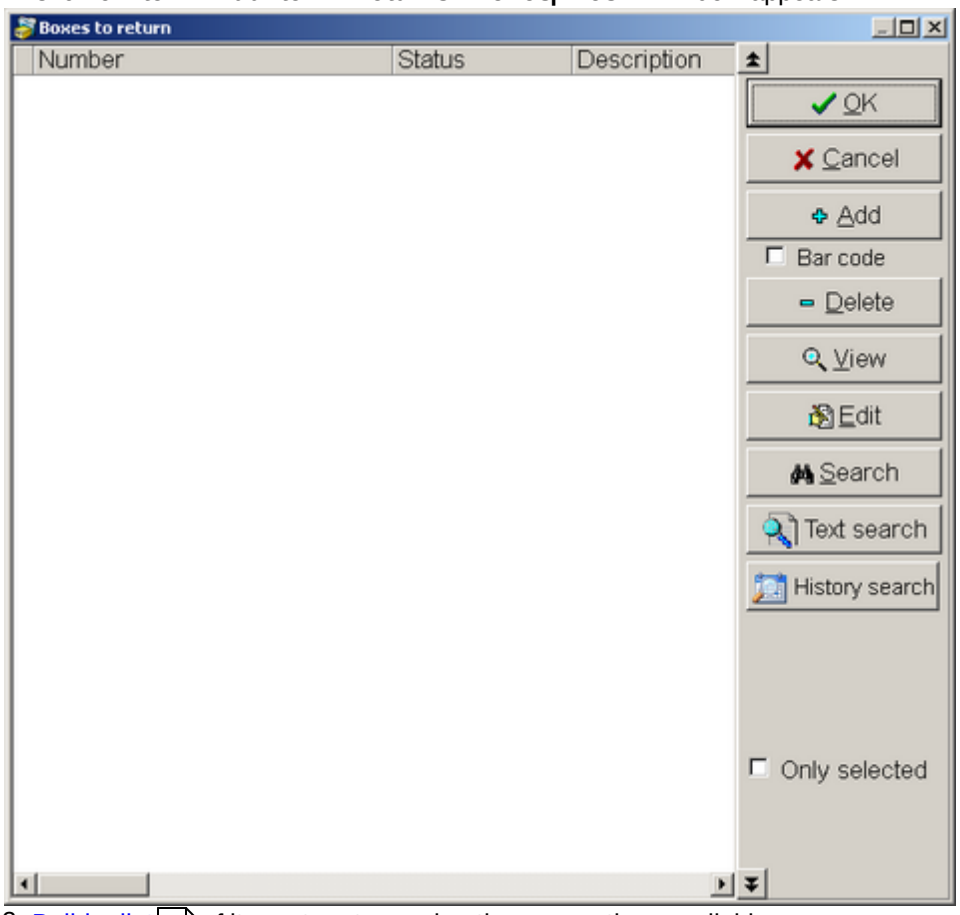
2. Enter the quantity of return items, select whether the items are Boxes, Files, or Tapes, and press **OK**.

Note : This quantity of returning items appears on the delivery slip for reference in planning and performing the delivery. For return courier, the actual quantity billed is taken from the quantity entered or scanned on the return delivery.

***Adding a return of specific boxes or files**

This option need only be used if a customer wants to ensure that specific items are picked up. It is easier to use non-specified returns.

1. Click on **Item->Add Item->Returns->Boxes|Files**. A window appears.



2. Build a list 356 of items to return using the may options available.
3. Press **OK** to complete the operation.

Note : Specified returns are listed on the delivery slip. If the delivery is performed with the

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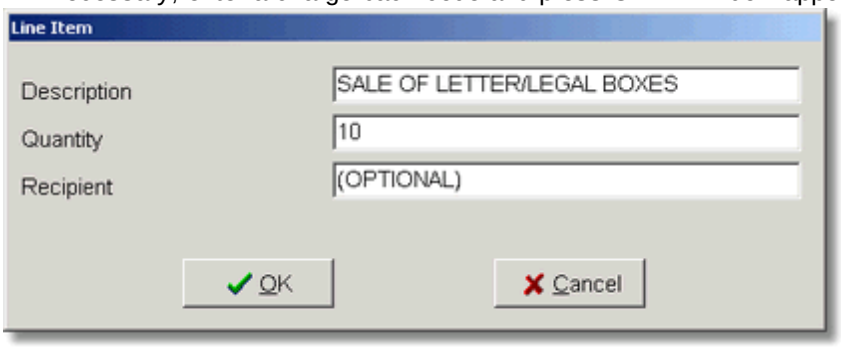
PDT, the PDT will prompt the driver for each item to be picked up. (It is not necessary to scan boxes in the order prompted.) If items were not picked up, a report will of missing items will appear upon returning the delivery. It is still possible to mark the return as complete, but missing items will be added to the process errors report 582. (see Reconciling process errors 576).

Adding a cardboard box sale

1. Click on **Item->Add Item->Box Sale**. When the customer is billed by charge back a window appears.
2. If necessary, enter a charge back code and press **OK**. A window appears.

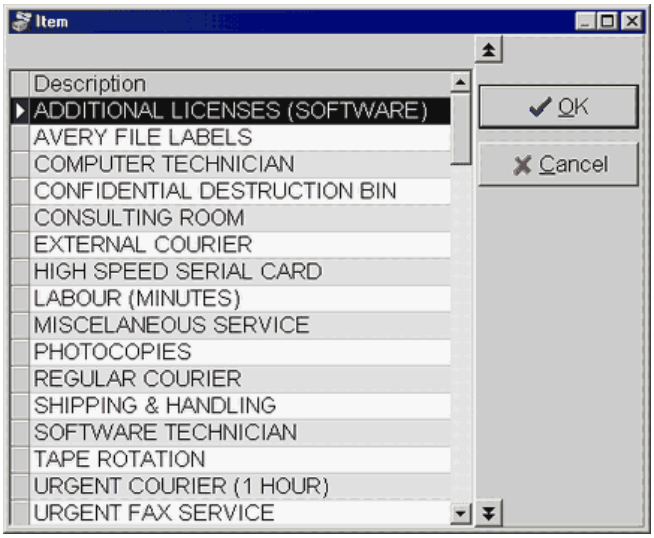


Note : The system displays by default the quantity entered in the Order Minimum field of the General Pricing module for the box sale items. No quantity of box sale less than this one can be ordered.

Adding products or services to an order as Line items

A record center can make any product or service available for order as a line item 637, which might or might not be billed. Common examples include bar code labels, non-standard size boxes, and various service charges. To be included on that list, the *Line Item* and *Order Entry* fields of the item in question must be set to "Yes" in the General Pricing module.

1. Click on **Item->Add Item->Line Item**. A list of line items appears.



2. Highlight an item and press **OK**.
3. Depending on the customer billing options, you may be prompted to select a department or charge back code. If so, elect the appropriate one and press **OK**. A window appears.

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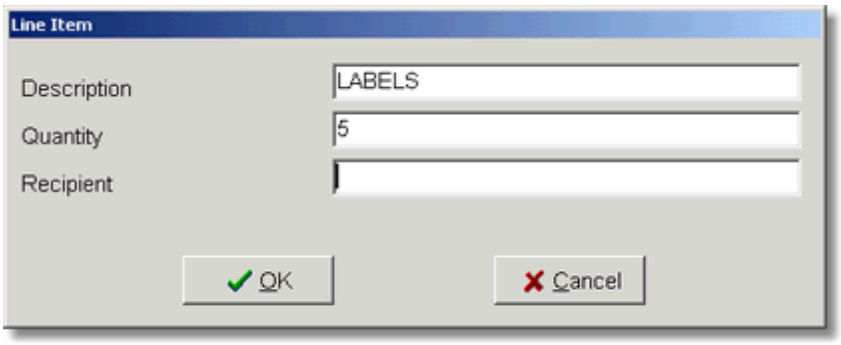


4. Enter the desired quantity, and optionally the recipient, and press **OK**.

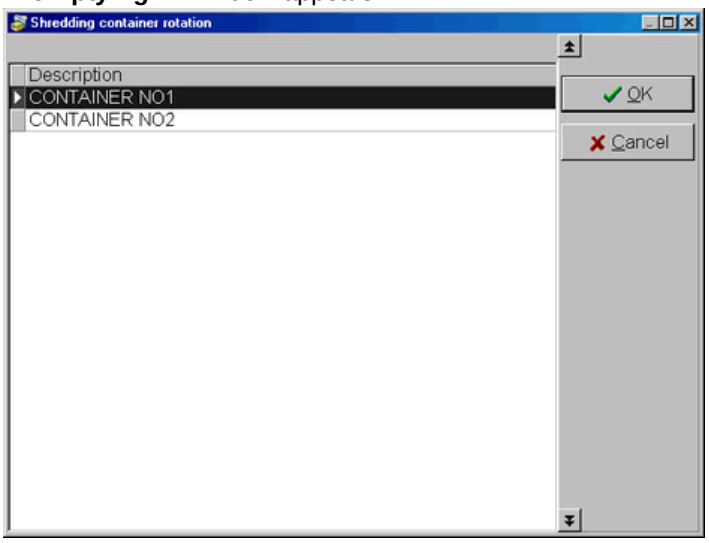
Adding shredding-related services to an order

Four shredding-related order options exist.

Operation	Containers	
	To customer	From customer
Shredding container rotation	1	1
Shredding container delivery	1	0
Shredding container return	0	1
Shredding container emptying	0	0

To add one of these services to an order:

1. Click on **Item->Add Item->Shredding container/bag rotation | delivery | pick up | emptying.** A window appears.



2. Highlight the type of container to be processed, then press **OK**.
3. The item will be added to the order.

Note: The container type must be made available to the customer 88 before it can be ordered. Shredding container delivery and return order items can be placed through *EDC RC* but not over the web, since they are typically associated with contract modifications.

Adding a box from a search

You may also create a list of boxes to order using box and file searches through the orders

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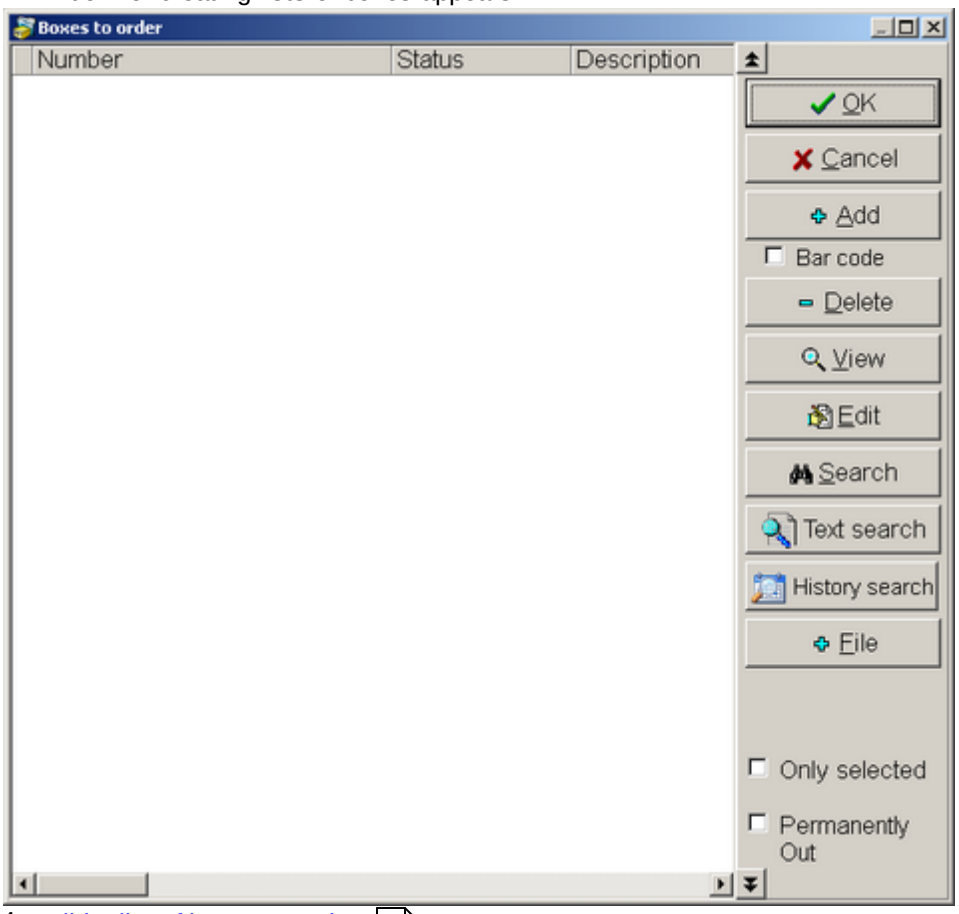
module.

1. From the menu, select **Item->Add Item->Box Search**. A window prompts for a recipient.
2. Enter the recipient and press **OK**.
3. If a window prompts for a charge back code, enter the charge back code and press **OK**. A window for creating lists of boxes appears.



4. Build a list of items to retrieve 356.

Note : By selecting a box in the ones that are added to the order and by clicking on the **File** button, it is possible to enter a description for a file contained in that box; this will indicate to the system not to order the entire box but only the file.

- To include only certain boxes from the list: select the boxes and files you want to add and check the field called **"Only Selected"**.
- If the boxes are to be permanently removed from storage, check the field called **"Permanently Out"**.

5. Click on the **Accept** button to confirm the addition of all the items to the order.

The available boxes and files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

*__Adding a file from a search__

You may also create a list of files to order using file searches through the orders module.

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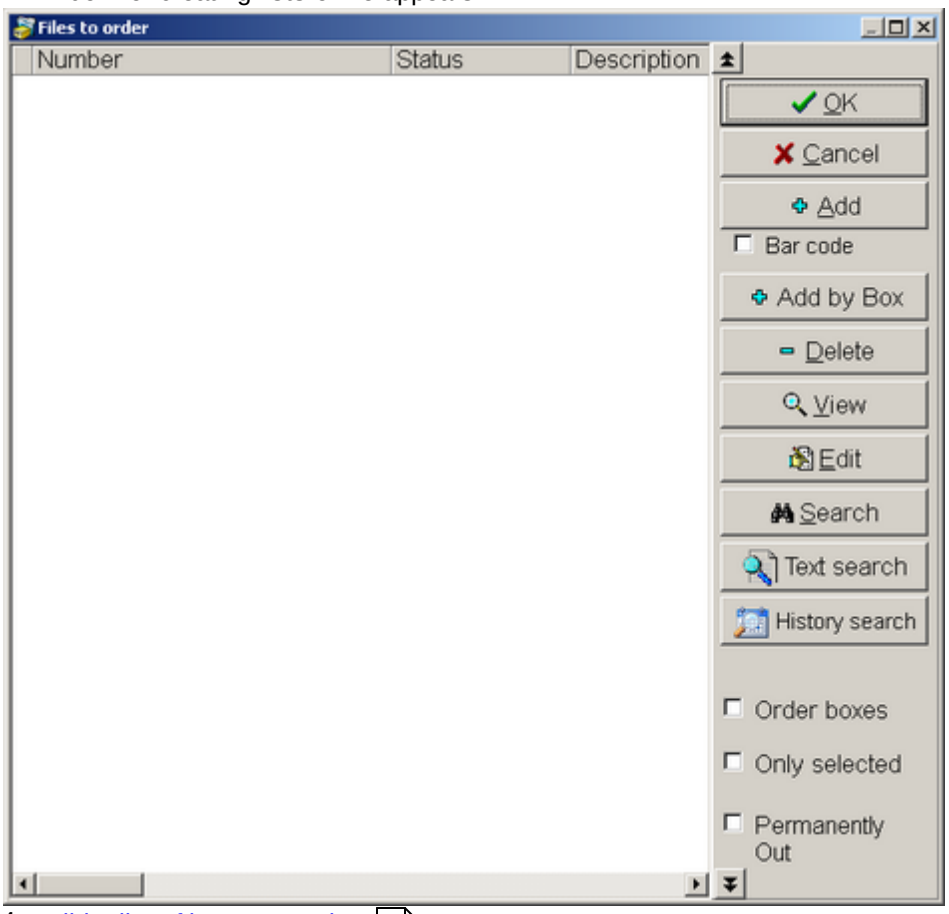
1. From the menu, select **Item->Add Item->Box Search**. A window prompts for a recipient.
2. Enter the recipient and press **OK**.
3. If a window prompts for a charge back code, enter the charge back code and press **OK**. A window for creating lists of file appears.



4. Build a list of items to retrieve 356.

- If your customer wishes to order the boxes containing the files rather than the files themselves, check the **"Order boxes"** field.
- To include only certain files from the list: select the files you want to add and check the field called **"Only Selected"**.
- If the files are to be permanently removed from storage, check the field called **"Permanently Out"**.

5. Click on the **Accept** button to confirm the addition of all the items to the order.

The available boxes and files are added to the order and a message appears for any rejected items, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.)

Adding an item (or return item) by text file importation

It is possible to add items to an order from a text file. This file must include one of the following types of information, with one item per line.

- Box number

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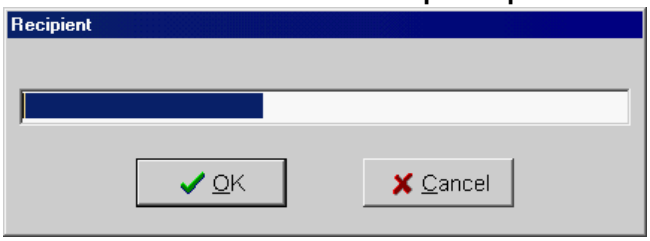
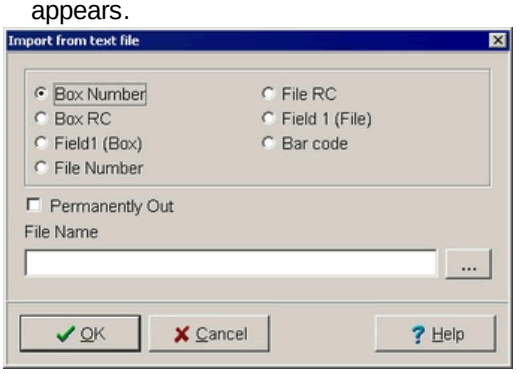
- Box RC number
- Box Field 1
- File number
- File RC number
- File Field 1
- Bar code

1. To add items click on **Item->Add Item->Import from text file**. (To add return times, Click **Item->Add Item->Returns/Pickups->Import returns from text file**.) A window appears.



2. For outgoing items you will be prompted to enter a recipient and press **OK.** (If the customer uses charge back billing 227, you will also be prompted for a Charge Back code.) A window appears.

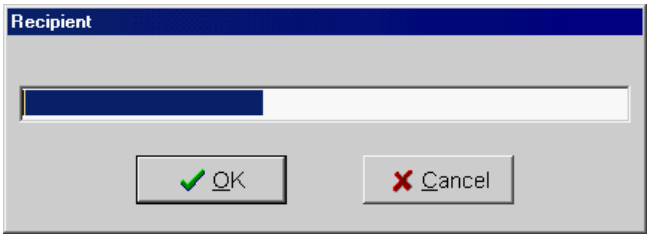


3. In the top area, indicate the type of data contained in the file.
4. Click the **"..."** button and browse to the text file, then click **OK**.

Adding an item by list

This option allows you to add a list of items that are specified using the same type of information (such as item bar code, box number, or file RC number). You may copy-and-paste in items using your operating system's clipboard, type the values in directly, or even scan bar codes in with a USB or wedge bar code scanner attached to the computer.

1. From the menu, select **Item->Add Item->Add to Order from List**. A window appears.



2. Enter a recipient and press **OK**. (If the customer uses charge back billing 227, you will also be prompted for a Charge Back code.)
3. A window appears.

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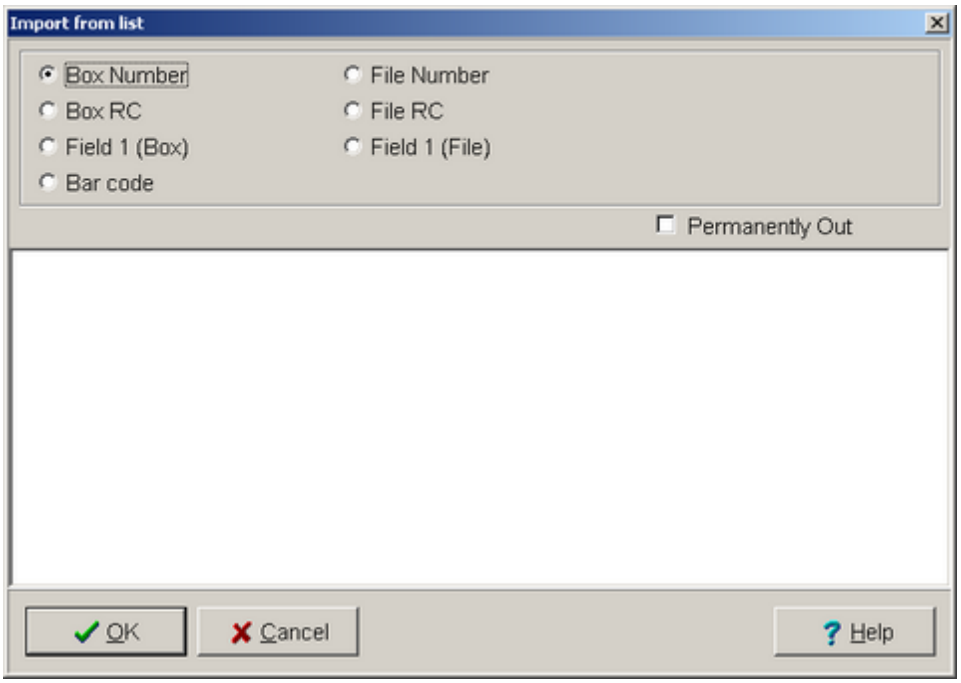

4. In the top area, indicate the type of data in the list.
5. In the bottom area, paste in the list, one record per line.
6. If the items are permanently out, select the **Permanently Out** checkbox.
7. Click the **OK** button.

Items that are accepted will be added to the order. If any items are rejected, an error message will be displayed explaining why.

Adding items of an item set

In Box and File records, there is a text field called Item Set 311. Entering the same value for multiple records for the same customer will cause them to be part of the same item set.

If several items are assigned to the same Item Set 311, (eg. "Friday Tapes"), ordering any item in the set will cause all items to be placed on the order. (EDC will notify you if any of the items are not available.)

If any of the items are not required, remove them from the order manually.

Related topics:

Placing an order in EDC RC 114
Introduction to the Order module 113

5.4.3.4 Establishing a recurring order

The recurring order module is used for scheduling orders for shredding rotations and line-items.

The order parameters and scheduling patterns are established in the recurring orders module. Then, on a daily basis around 9:00 AM, the system consults this list of rules and creates those orders due to be delivered for the subsequent delivery date.

Note: Orders deliverable within the next two days should be entered directly as orders.

In setting up the recurring order, it is necessary to specify the user, delivery type, and delivery

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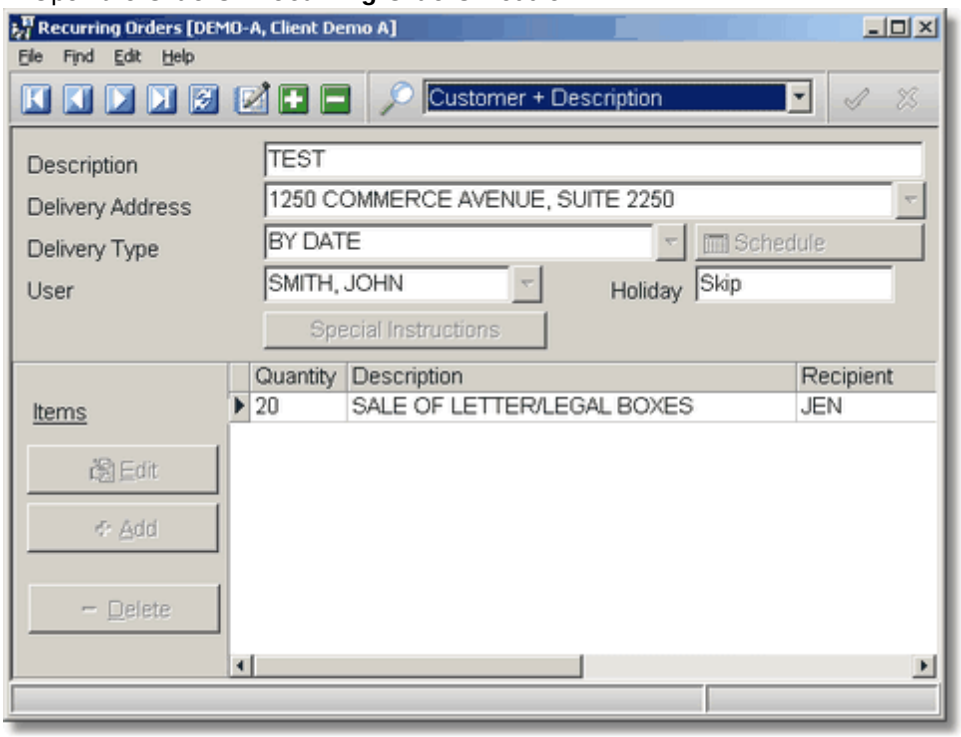
address to use. If the profile of a user is made inactive or modified such that it can no longer be used to create the order, an error will occur and the order will not be created. Therefore, it is good practice to set up a special authorized user for recurring orders.

To establish a recurring order:

1. Open the **Orders->Recurring Orders** module.



2. Click on **Edit->Add**. A dialogue box prompts for a customer.
3. Enter the *customer key* and press **OK**. A blank recurring order appears in edit mode.
4. In the **Description** field, describe the order. This is for reference purposes.
5. Press the **Tab** key to take you to the **Delivery Address** field, and press the **down** key or click the drop down box to select the delivery address from the list of addresses available to this customer.
6. Press **Tab** and **Down** again to take you to the Delivery Type field and select a **delivery type**. Note that the customer must have a by date delivery type available.
7. Press **Tab** and **Down** again to take you to the **User** field and select an authorized user.
8. If there are special instruction that you wish to have appear at the bottom of the delivery slip, Click on the **Special Instructions** button add them and click **OK** when done.
9. In the **Holidays** field, specify whether to *Deliver after*, *Deliver before*, or *Skip* a deliveries that would fall on holidays

Add items

10. Add items to the order by pressing on the **Add** button.
11. Select the type of item to add (*Returns/Pickups, Line Item, Shredding container / bag rotation,* or *Shredding container emptying*
12. Select the item from the list
13. If prompted, select the department and sub-department for billing purposes
14. Enter the quantity and (optionally for line items) a recipient and press **OK**.
15. When all the items have been added to the list, press the **Accept** button.

Establish the Schedule

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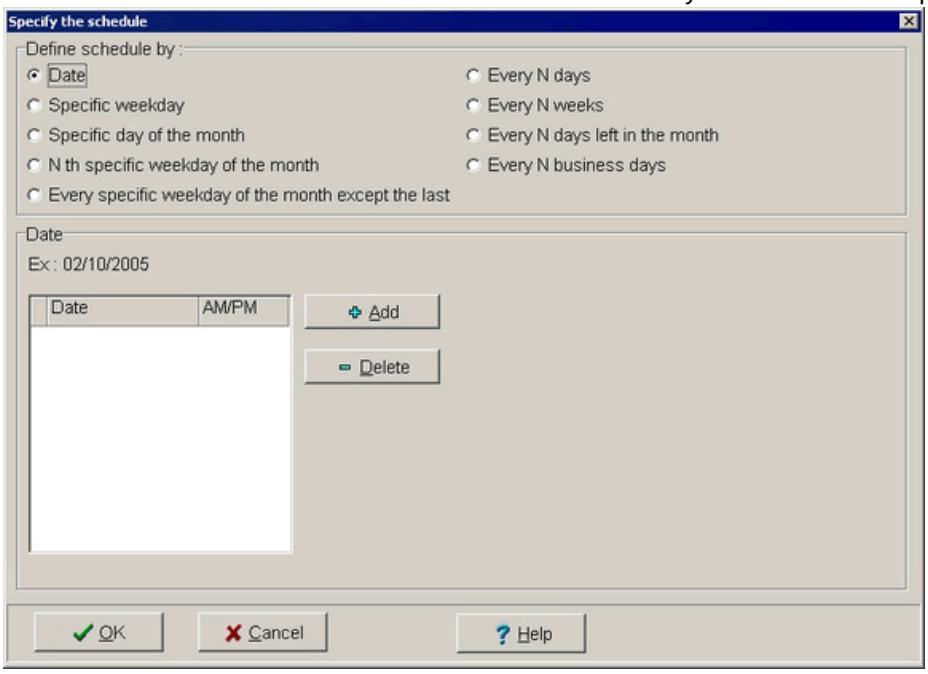
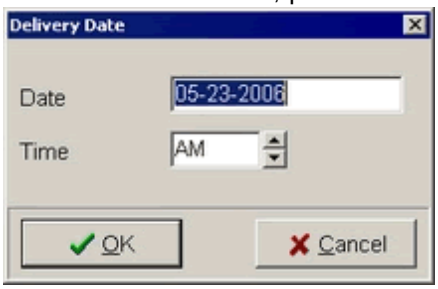
16. Press on the **Schedule** button to set the order's delivery dates. A window appears.



Select the way you want to define the schedule in the list of options. For each option a different set up is shown :

When Date is selected :

To add a date in the list, press on the **Add** button. A window appears



- Enter a date and select a time of delivery (AM or PM) and press **OK**.

- To delete a date, select a date in the list (it will appear highlighted) and press on the **Delete** button.

When Specific weekday is selected :

- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Specific day of the month is selected :

- Select a Day of the month in the list (1,2,3...).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

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When N th specific weekday of the month is selected :
- Select a N th week (First, second, third ...) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every specific weekday of the month except the last is selected :
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N days is selected :
- Select a number of days (N days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N weeks is selected :
- Select a number of weeks (N weeks) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N days left in the month is selected :
- Select a number of days left in the month (N Days Left) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N business days is selected :
- Select a number of business days (N Business Days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

17. Once the schedule has been established, press **Ctrl-Enter** or click the green check mark to accept.

Related topics
Overview (Recurring Orders) 583
Fields (Recurring Orders) 584

5.4.3.5 Establishing a rotation schedule

Many record centers offer their customers a service of securely storing their electronic back-up tapes. They drop off the tapes when they are required and pick them up the next day to return them to the vault. These tapes are typically rotated according to a pre-determined schedule.

There are several ways in which people manage their tape rotation schedules.
- You can create rotation schedules in EDC RC
- Your customers can create rotation schedules on ActiveWeb (See ActiveWeb documentation)

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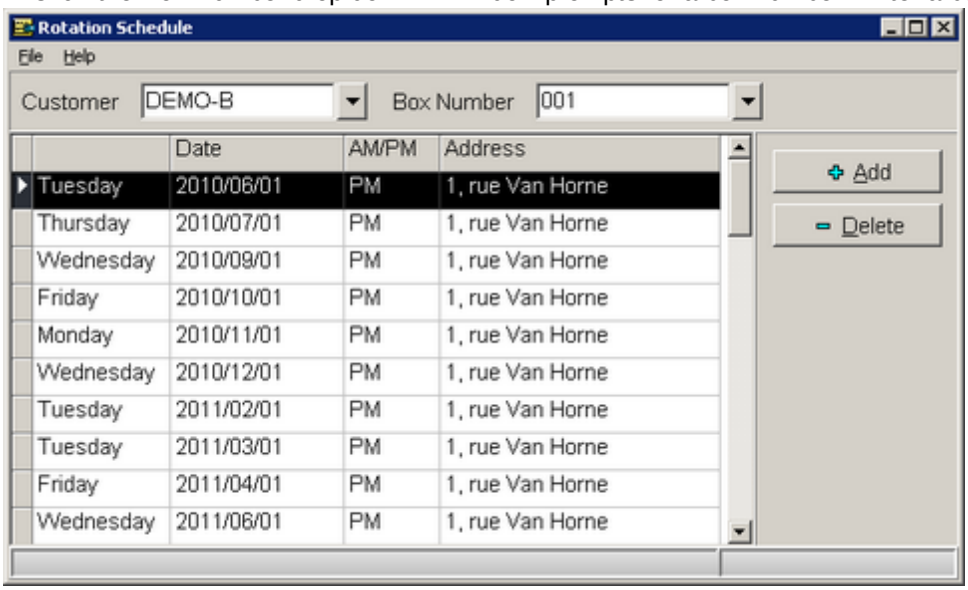
- Your customers can create rotation schedules in ActiveFile (See ActiveFile documentation)
- Automated tape management systems (TMS) can place the orders using the order processor. (Note that this option does not make use of the rotation schedule module)

To have access to the rotation schedule module for a customer, this customer must have a web license that includes tape rotation functionality.

To establish a rotation schedule in EDC RC:

- Understand the pattern in the delivery dates. Marking the dates on a calendar can be helpful, especially for more complex patters.
- Decide how long you will schedule rotations for these tapes for. (eg. the next 3 years?) Note that customer and 305 record center holidays 184 should be entered in advance for at least the same period, so that you can be notified if any of your deliveries would fall on a holiday.

1. Open the **Inventory->Rotation Schedule** module.
2. Click the **Customer** drop-down. A window prompts for a customer. Enter a customer key.
3. Click the Box Number drop-down. A window prompts for a box number. Enter a box number.



	Date	AM/PM	Address
Tuesday	2010/06/01	PM	1, rue Van Horne
Thursday	2010/07/01	PM	1, rue Van Horne
Wednesday	2010/09/01	PM	1, rue Van Horne
Friday	2010/10/01	PM	1, rue Van Horne
Monday	2010/11/01	PM	1, rue Van Horne
Wednesday	2010/12/01	PM	1, rue Van Horne
Tuesday	2011/02/01	PM	1, rue Van Horne
Tuesday	2011/03/01	PM	1, rue Van Horne
Friday	2011/04/01	PM	1, rue Van Horne
Wednesday	2011/06/01	PM	1, rue Van Horne

4. The module window is populated with any scheduled deliveries for that tape.

You may add or remove delivery dates using various tools, as follows:

To add an individual delivery date:

- Click the Add button
- In the window that appears, enter the delivery date (and if appropriate, AM or PM delivery cycle).

To delete delivery dates:

- Select the delivery dates to delete. (They will be highlighted in black)
- Click the **Delete** button. The dates will be removed.

To add a series of delivery dates:

- From the menu, select **File->Delivery Date Series Creation**., and the method that you wish to use.

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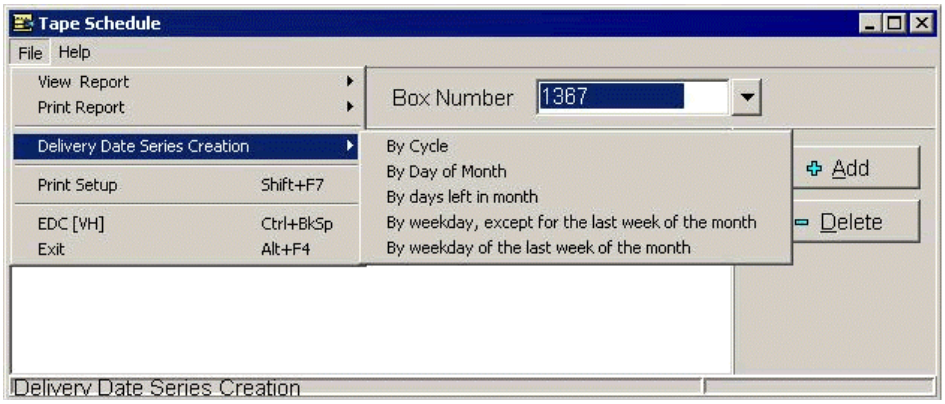

- **By cycle:**

1. Choose a start date for the deliveries
2. Choose the number of days you want the cycle to be repeated
3. Choose the end date of the deliveries
4. Select a delivery address in the list (it will appear highlighted) and press **OK**

- **By Day of Month:**

1. Choose a start date for the deliveries
2. Choose the day you want the tapes delivered (ex: for the fifteenth write 15)
3. Choose the end date of the deliveries
4. Select a delivery address and press **OK**

- **By days left in month**

1 Choose a start date for the deliveries
2 Choose the number of days before the end of the month
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

- **By weekday, except for the last week of the month :**

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

- **By weekday of the last week of the month:**

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

Example: If you want the tape to return every Friday you would:

1 Go in **Tape schedule->Delivery Date Series Creation -> By Cycle**
2 Choose a start date (on a Friday)
3 Choose a number of days (7)
4 Choose any end date
5 Select a delivery address and press **OK**

Note: If there are any invalid dates, a report of errors will appear in the window. When this happens one asks the customer whether they would like to add an alternate date (eg. the day

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before or after), or skip the delivery.

Note:
- A customer must have a web license that includes Rotation in order to make use of this function.
- Many record centers use ActiveWeb instead of this module to enter rotation schedules on behalf of the customer.
- Creation of rotation orders is triggered by the creation of picking lists. It is therefore important to create a picking list 529 every delivery cycle (day or half-day), even if no external orders have been placed.
- The delivery type used for rotations is specified as the scheduled order delivery type 202 in the Management->System Information module.
- If tapes are combined as a single set, the schedule is assigned to the master tape, and the entire group of tapes is assigned to the same **Item Set**.
- It is very important that tape schedules be creates at least one day in advance before the first delivery date, as automatic tape orders are generated one day in advance.

Related topics:
- Changing a delivery address for tape rotation 360
- Viewing or printing tapes returned on a holiday 361
- Viewing or printing the tape schedule of a customer 361

5.4.4 Picking operations

5.4.4.1 Creating a picking list

Once orders have been entered, it is possible to start fulfilling them. The picking list is used to guide you through this process. In the case of line items and shredding containers, the picking list will tell you what is required, for whom, and how many. In the case of boxes and files, the picking list will guide you to the location to retrieve the items, ordered by location.

Because picking lists are ordered by location, it is efficient to pick many orders at once, rather than running back and forth.

For every delivery cycle, it is important to do what is known as a **final pick**, once the cut-off time for orders passes and you know that there will be no more items to pick for that cycle.

In practice, if there are not too many items it may be efficient to wait until the cut-off to do all of your picking.

To create a picking list:
1. From the **Orders->Picking List** module, select **File->Create picking list**, or press the **F2** key. A window opens

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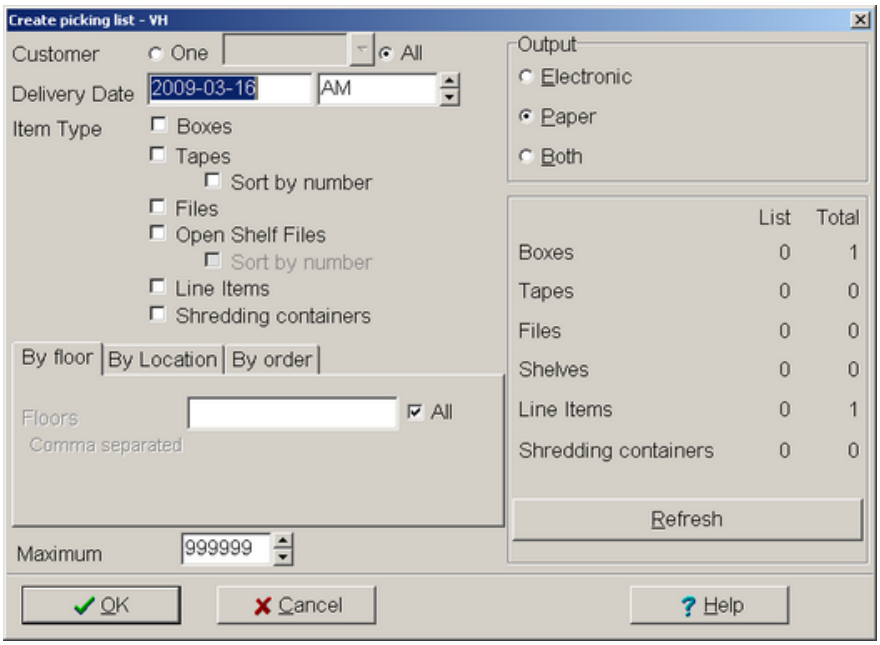

2. Select the desired options to create a picking list, including the item types and the desired output format.

   List criteria:

   Various options allow you to specify what to include or exclude from the picking list.

   - **Customer:** You will usually pick for all customers, but it is possible to limit the list to one if necessary.
   - **Delivery date:** This will default to picking for the next delivery cycle, though it is possible to change this to pick *by date* orders in advance.
   - **Item type:** Item types not selected will be excluded from the list. Items are typically sorted by location unless the option to **sort by number** is selected.
   - **By floor:** If the "All" box is deselected, you may specify a list of picking levels to pick from. It is also possible to specify a range of locations with **By location**, or a a list of orders with **By order**.
   - **Maximum (number of items to include per picking list)**: If you want to break picking into multiple lists, specifying the maximum number of items to include is a very practical means of doing this.

   Output:

   The output section allows you to chose whether to send the picking list in **Electronic** format to the PDT, print it on **paper**, or do **both**. Electronic is standard, but EDC will remember your previous setting.

   List / Total:

   Total shows the number of each type of item remaining to be picked for the delivery cycle. **List** shows the numbers that will be included on the list, based on the item types and picking levels selected. (Click the **Refresh** button to update this display after changing options.)

3. Press the **Okay** button. If a *paper* or *both* output options were selected, the picking list will print.

4. If *Electronic* or *Both* output options were selected, you will be prompted to prepare the prepare the PDT for download. Place the PDT in the cradle or connect it to the cable, then press **2** from the main menu to receive. Then click **Okay** on the computer to start the transfer.

- Picking labels will be printed automatically for PRE-ADD or ALL files, depending on the *Print*

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Picking Labels setting in the System Information module 197.
- *File out card* and *open-shelf out card* labels and *box picking labels* may be printed according to options in the Customer Information module 225.

5.4.4.2 Processing rush orders using pick and run

Rush orders are orders that are not grouped with other orders and must be processed immediately rather than observing regular delivery cycles. (These are orders that have ship modes of *By time* or *24 Hours*. They are picked separately using a process called **Pick and Run**.

When a rush order is entered, notification e-mails are sent to the addresses specified in pager options 580. These e-mails include the order number.

To pick an order using Pick and Run:
1. Open the **Orders->Order module**.
2. Navigate to the order specified by the notification e-mail. (This will frequently be the one that the module opens to).
3. From the menu, select **File->Pick and Run**. A message appears "Prepare the portable terminal for the data transfer".

From here on, the processing of rush orders is similar to any order or delivery, except that:
- If the picking list is not downloaded to the PDT within the time limit specified in pager options 580, the *first warning* will be sent.
- When picking results are uploaded back to the computer, the delivery slip will be immediately printed. Items not picked are assumed to be excluded.
- If the picking list (result) is uploaded back to the computer within the time limit specified in pager options 580, the *second warning* will be sent.

Note that:
- Rush deliveries may be included on delivery routes
- Other options apply, such as truck validation and delivery with PDT

5.4.4.3 Picking items with the PDT

Once one or more picking lists have been downloaded to the PDT, you may pick them as follows:

On the PDT:
1. If necessary, turn on the power on the pdt, and if prompted to login, scan your employee bar code.
2. From the main menu, select **3-Processing->1-Picking** (by pressing **3**, then **1**). the list of picking lists on the PDT is displayed, including the number and type of items, and the picking levels to find them on.
3. Press the number corresponding to the list you wish to pick. The first item of the list is displayed.
4. Process the items on the list as described below

As each items is found or skipped, you will be advanced to the next item. Once the last item is found, you will be returned either to the main menu or to the first skipped item (in which case, Press **0** and **Enter** to quit).

Picking items:
- **Boxes (or tapes):** Go to the location on the PDT, then pull and scan the box. Note that scanning

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boxes out of order is permitted.
- **Files from boxes:** Go to the location and pull the box indicated on the PDT (or the picking label - which is often easier). Once you have found the file, prepare and insert the out card, then pull and label the file with the "On File" bar code. Scan the file, box, and location. (Note that for file pulls, EDC expects boxes to be returned to the same location). **Note:** When the item on the PDT is a file, the **8** key may be pressed to display additional information about the file.
- **Files from open shelves:** Prepare and insert the out card, then pull, label, and scan the file.
- **Other items:** To pick line items, press **4 (Pck)** on the PDT.
- Items not found: If an item is not found, skip it and exclude it manually; press **2 (Nx)** and **ENTER** ., Then press **2 (Nx)** again.

Note : When an item is picked properly, the PDT automatically displays the next item. If there is an error, the PDT gives a warning sound and does not display the next item. Press the **Clr** button on the PDT, then verify that you have scanned the correct label.

Once you are done picking:

Upload picking results to the computer:
5. On the computer, open the **Orders->Picking** module.
6. From the menu, select **File->Upload Pick Results**.
7. Place the PDT in the cradle so that the green light is on and the infrared windows align.
8. On the PDT, select **2-Send results**, **1-Picking**, then the **number** of the list to send.
9. The PDT will indicate Transfer complete, and the computer will warn if any items were not picked.

Exclude items not found:
If files were not found, one option is to bring the box and the file picking label back to a better lit area for a second person to search. This person will search the box and then either find the file and pick it manually, or confirm that it should be excluded (and call the customer).

To manually exclude (or pick) a file:
10. Open the **Orders->Picking** module
11. From the menu, select **File->Manual Picking**.
12. From the picking label, enter the order number
13. Highlight the item(s) to exclude or pick, and click the exclude or pick button. (You will be prompted for a reason for excluding the item. This will appear on the delivery slip).
14. Click the **Close** button when done.

5.4.5 Shipping operations

5.4.5.1 Creating Deliveries

Once the cut-off time for a delivery cycle has passed and the picking has been done, the next step in processing standard orders is to perform delivery creation.

Notes:
- It is possible to perform delivery creation before all picking results are uploaded. However, delivery creation must be repeated once these results are uploaded, in order to close the outstanding deliveries.
- It is necessary to perform delivery creation after the cut-off time. It is also possible to create deliveries earlier, but this may result in multiple deliveries for orders that would otherwise be grouped together.

To perform delivery creation:

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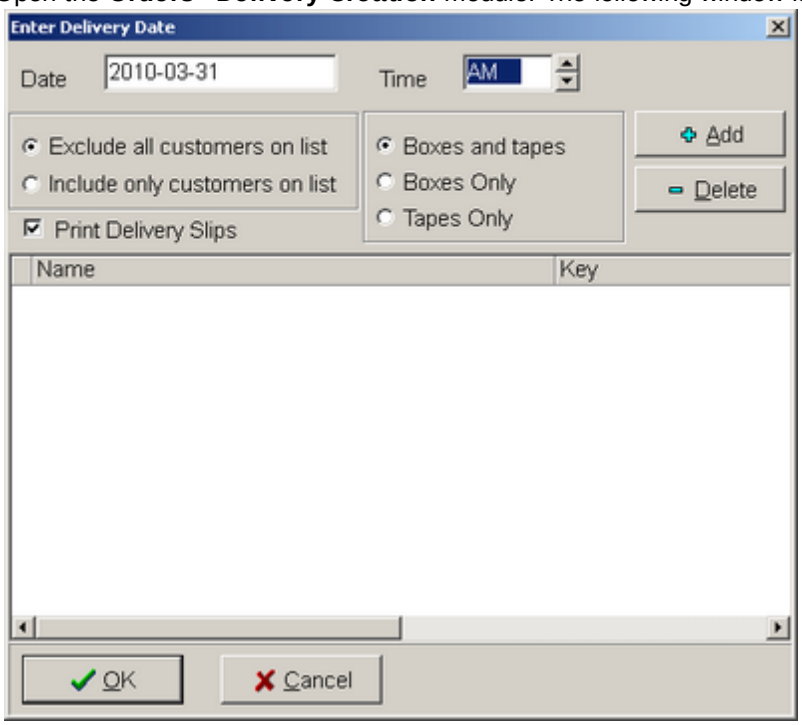
1. Open the **Orders->Delivery Creation** module. The following window is displayed:



2. Make any necessary modifications to the default delivery creation parameters:

- **Date and Time:** These default to the current delivery cycle. It is not necessary to change this during normal operations.
- **Exclude | Include all customers on list:** It is possible to override cut-off times for specific customer accounts, in which case deliveries for these customers would be done at a different time using this option. The lower panel of the window contains an exclusion list 210 specifying customers for whom deliveries are created separately. This is defined in the System Information 195 module, and may be temporarily modified here by clicking on the **Add** or **Delete** buttons to add or remove customers from it. To create deliveries for the rest of the customers, accept the default setting of *Exclude all clients on list*. To create the non-standard deliveries, select the "*Include only clients on list*" option.
- **Boxes and Tapes | Boxes only | Tapes only:** This option allows you to create deliveries for tape accounts separately from box accounts. This may be useful if your tape processing operations are separate.
- **Print Delivery Slip:** If you are using delivery routes for these deliveries, you may deselect this box and print the delivery slips for record center deliveries through the **Orders->Delivery Route** 543 module. (Slips for deliveries that cannot be included on delivery routes will be printed on delivery creation even if this option is not selected.) This has the advantage of issuing the delivery slips pre-sorted by route and stop order.

3. Press **OK**. The system will create deliveries according to all the parameters previously selected.
4. Retrieve any delivery slips that print out. These will be for deliveries for External courier or client pick-up, Fax delivery, or Imaging delivery. Process these accordingly.
5. Process deliveries for record center delivery using delivery routes 136.

Notes:

- If orders for a delivery were not completely picked, that delivery will go to the *Created* state instead of directly to the *Closed* state.
- If all items for the delivery were excluded during picking and there are no returns or line items, the

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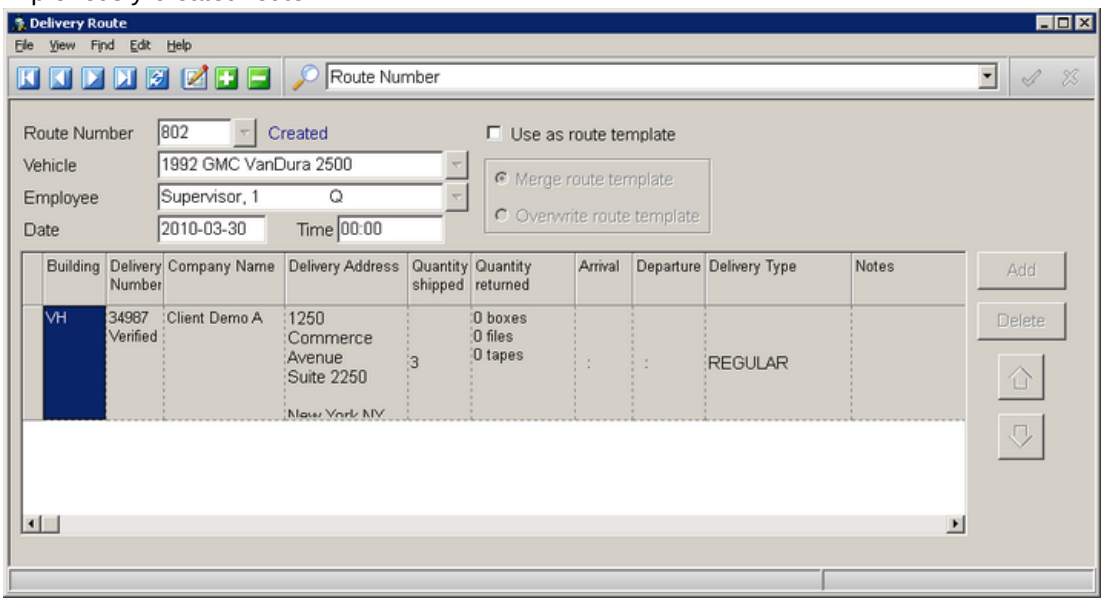
delivery will become verified, and no trip charge or fuel surcharge will be applied.
- Delivery slips may also be reprinted 536 through the delivery module

5.4.5.2 Working with delivery routes

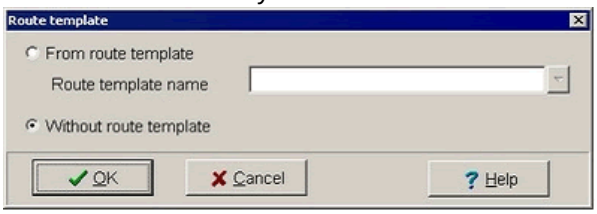
Once deliveries have been created 134, the next steps for deliveries that have a "*Record Center*" ship mode are to:
- Organized deliveries into routes, based on route templates,
- Print the delivery slips and a summary report for the route,
- Validate that items are correctly grouped to deliveries for the truck,
- Download the deliveries for the route to the PDT for *delivery with PDT*.

To process delivery routes:

1. Open the **Orders->Delivery Route** module. The module window appears, opening to a previously created route.



2. Press the **Insert** key or click the "**+**" button to add a new route.



3. Typically, you will use a route template. Select "**From route template**", and click the drop down to select a template. (For instructions on adding a new template, see Creating route templates 61)
4. Click the **OK** button. Any available deliveries to addresses on the template will be added to the route, in the order in which they appear on the template.
5. Specify the **Employee** and **Vehicle** for the route. Change the **date** if necessary.
6. If any deliveries are not to be included on the route this time, highlight the delivery and click the **"Delete"** button.
7. Re-order the deliveries by selecting the delivery and using the **up** and **down** arrows.
8. *Click the **"Add"** button to add any additional deliveries. (Note that if you have multiple routes, it may be easier to create the other routes first, to reduce the list of available deliveries.)
9. Press **Ctrl-Enter** to save the route.

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To modify a route template (optional):
1. Navigate to a delivery route that you wish to use modify the template.
2. Press **Ctrl-E** to enter edit mode.
3. Check the **Use as route template** box.
4. Select "**Overwrite route template**" if you wish to clear all other delivery addresses off the template; select "**Merge route template**" to keep the delivery addresses that are already on the template.
5. Press **Ctrl-Enter** to save.
6. If a list of templates appears, select the template to modify and click the **OK** button.

For each route that you have created:
1. Navigate to the route
2. From the menu, select **File->Print Report->Current Route** to print the route summary.
3. From the menu, select **File->Print delivery slips of route** to print the delivery slips in order.
4. *Download the validation list to the PDT 137, and provide the driver with the paperwork and PDT to perform truck validation of their deliveries 137.
5. *Once validation is complete,upload results back to the computer 137, and download deliveries to PDT 137 for delivery with PDT.

5.4.5.3 Validating items for delivery (Truck Validation)

For efficiency, picking is done in batches that may include items from many orders for many customers. These items are collected in your shipping area.

Sorting picked items onto deliveries:
Boxes and files include the customer key. It is possible to move items between accounts. Therefore, you cannot always rely on the customer key on the label. However, this can provide a useful initial sorting tool.

- (Optional) Pre-sort items by customer key.

Download truck validation lists to PDT:
1. Open the **Orders->Delivery Route** module to the correct record (or **Delivery** module, if processing an individual delivery).
2. From the menu, select **File->Truck validation->Download list to PDT**. A window prompts you to prepare the PDT.
3. Place the PDT in the cradle, ensuring that the green light on the base is on and the infrared windows align.
4. On the PDT, from the main menu press **1** to receive and **6** for truck validation. The screen reads "Waiting"
5. On the computer, click **Ok** to begin transmission.
6. Once done, press **Clr** on the PDT to return to the main menu

Perform truck validation:
- Retrieve your route summary, delivery slips, and PDT with downloaded validation list.

1. On the PDT, from the main menu press **3** for processing and **6** for truck validation

For each delivery
2. Use the delivery slip to ensure that you have all necessary line items and shredding containers.
3. Locate and retrieve the boxes and files for the delivery
4. With the PDT, scan the delivery slip barcode.
5. Scan each box and file on the delivery.
6. Once the last item has been scanned, the PDT will prompt "Quantity shipped". Type the number of containers shipped and press Enter in the **PDT**.
7. Proceed to the next delivery.

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Note: If an item that is not on the delivery is scanned during validation, the PDT will beep unhappily, and the screen will indicate "*Item not on list*". Remove the incorrect item and press the **Clr** button on the PDT to continue.

Send truck validation results to EDC

8. On the computer, open the **Orders->Delivery Route** module.
9. From the menu, select **File->Truck Validation->Upload list from PDT**.
10. On the PDT from the main menu press **2**- Send results, **6**- Truck Validation, **1**- All.

New delivery slips may be printed with the quantity of containers shipped.

Notice at this point that the delivery has the On Truck status when displayed in the delivery module. The history of a delivery can be viewed from the File -> View History menu operation in the delivery module.

For the customers that use this option, the next step will be to download deliveries to PDT.

5.4.6 Delivery operations

5.4.6.1 Delivering items with the PDT

Delivery with PDT is optional by account. With this feature turned on for a customer, items to be delivered are downloaded to the PDT before leaving the record center. This permits the driver to scan the items at the customer site and ensure that the correct items are being delivered. It also makes it easy to confirm that the correct items are being picked up at the customer site, if the customer provided this information in placing the order.

This feature is not universally used, as it requires that the drivers have PDTs with them, and it also requires extra time.

Delivery with PDT enables you to print a simple receipt for items picked up at the customer site if you have the correct portable receipt printer. However, the "E-mail return slip" feature may be used to provide customers with a similar confirmation of which items were picked.

To download deliveries to the PDT:

1. Open the **Orders->Delivery Route** module (or **Delivery** module), and navigate to the correct record.
2. From the menu, select **File->Download deliveries | list to PDT**. You will be prompted to prepare the PDT.
3. Prepare the PDT to receive by placing it in the cradle and pressing **1**- Receive, **4**- Delivery/ Return.
4. Once the PDT is waiting, press **Enter** or click **Okay** on the computer to transmit the list.
5. When done, press **Clr** on the PDT to return to the main menu.

To perform the delivery and return:

1. On the PDT from the main menu, press **3**-Processing, **4**-Delivery/Ret.
2. **Scan** the bar code on the delivery slip. If items have been downloaded, the PDT will display "Delivery", the delivery number, and "Scan"
3. **Scan** the bar coded **items** to be delivered.

Once the last item to be delivered is scanned, (or if there are no outgoing items for that delivery on the PDT), the PDT will prompt "**Location**", indicating that it is entering the return portion of the delivery.

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4. **Scan** your **truck location** bar code or press **0** and **Enter** to skip. The PDT will display "*Return*", the delivery number, and will prompt for what type of item to process on the return
5. Select the type of item to return by pressing the corresponding number (see below). Once there are no more types of items to return, press **0** to quit.

- Press **1** for Box, then scan any pre-add or returning boxes
- Press **2** for File, then scan any pre-add or returning files that are not in boxes
- Press **3** for Container rotations (when something empty is used to replace something full), scan the container bar code, then enter the fraction full. (See the next section 139 for more details on shredding).
- Press **4** for container emptying (when no new container or liner is left behind)
- When done scanning each type of item, press **0** and **Enter** to return to the previous menu.

(Note that are not bar coded and do not exist in pre-add must be added to the return through the return delivery module. In general, many record centers strongly encourage customers to not send unlabelled items for storage.)

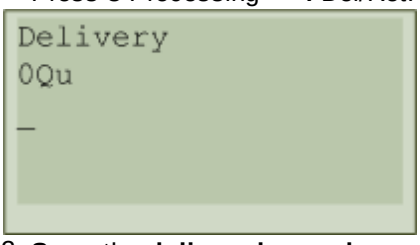
6. The PDT prompts for the quantity of receipts to print on the portable printer (0,1,2,3), enter the desired **quantity** and press **Enter**.
7. Repeat for each delivery. Press **0** and **Enter** to return to the main menu after the last delivery.

As soon as possible,
Upload deliveries to EDC as follows:
1. Open the **Orders->Return Delivery** module.
2. From the menu, select **File->Upload return delivery list from PDT**. The computer will indicate that it is waiting.
3. Place the PDT in the cradle, and from the main menu press **2**-Send results, **4**-Delivery/Ret, **1**-All and **Enter**.
4. 4 Click on File -> Upload list from PDT
5. 5 An information message appears: "Is the return complete ?". Press Yes or Cancel to close the return and No to return other items.
6. 6 If you have pressed Yes or Cancel, the window for the manual return appears (see Returning a delivery 549)

5.4.6.2 Rotating or emptying a shredding container with the PDT

Orders for shredding services are frequently scheduled through the reoccurring orders 583 module. Orders may also be placed individually as required by the customer. Once the record center and customer have been set up for shredding service 88 and an order has been generated, the steps for fulfilling these orders are as follow:

At the customer site:
At the customer site, with the PDT, the driver will:
1. Press **3** Processing -> **4** Del/Ret.



2. **Scan** the **delivery bar code**
3. If items were uploaded for delivery with PDT, perform the delivery by **scanning all delivery**

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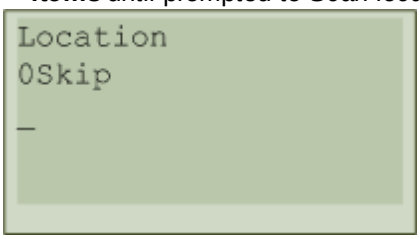
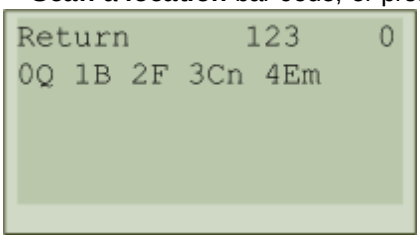
items until prompted to *Scan location* (for the return), or press *0Skip.*



4. **Scan** a **location** bar code, or press **0** and **Enter**. You will be brought to the Return Screen

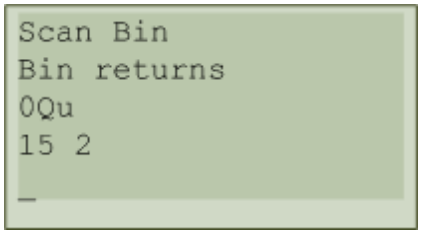


Return *(Delivery Number)* *(Number of items)*
0Q 1B 2F 3Cn 4Em

Note: 0=Quit 1=Box 2=File 3=Container Rotation 4=Empty container

- **To rotate a container:**
  1. From the Return menu on the PDT, press **3**.

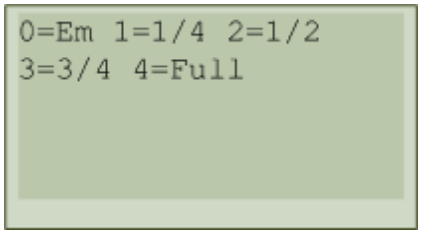
  The PDT screen will show the following information :



  Scan Bin
  Bin returns
  0Q
  (Bar code of scanned item, if any)

  2. **Scan** the **container bar code**

  The PDT screen will show the following information :



  0=Em 1=1/4 2=1/2
  3=3/4 4= Full

  3. **Press** the number corresponding to how full the container is (ex: 1 for a quarter full container).

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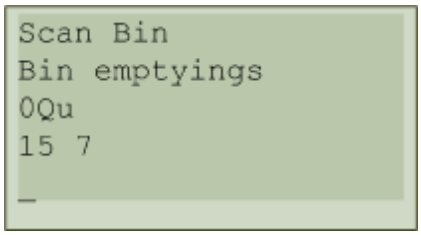
4. Repeat, or press **0** and **Enter** after scanning the last container to return when done, bringing you back to the *Return* menu.

- **To empty a container:**
  1. Press **4** from the Return menu on the PDT
  The PDT screen will show the following information :



  Scan Bin
  Bin emptyings
  0Q
  (Bar code of scanned item, if any)

  2. **Scan** additional bins, or press **0** and **Enter** after scanning the last container to return when done, bringing you back to the *Return* menu.

Complete the return delivery:

1. From the *Return* menu, process any additional boxes or files on the return in the usual way, then press **0** to complete the return
2. If no receipts are required, press **0** to proceed to the next delivery
3. If no deliveries remain, press **0** and **Enter** to return to the main menu
4. Upon returning to the record center, upload your deliveries 557 on a workstation. On the delivery return, for each type of container, the quantity delivered and the quantity returned will be recorded.

5.4.6.3 Performing a fax delivery

Like imaging on demand 141, fax deliveries can be useful when a customer requires information from a file but not the physical file itself. Orders are processed in the same way as any other order. Once the delivery is created, the delivery will not go on a truck. Instead, it will be processed as follows:

1. Open the **Orders->Imaging on demand** module.
2. Select the transit location, then click **OK**.
3. A window prompts you to *"Select Delivery"*. **Scan the delivery slip**, or type the **delivery number** and click **OK**.
4. A window prompts you for *"Number of faxes sent, Delivery [# of delivery]"*. Enter the number of **pages** to bill for, then press **Enter** or click **OK**.
5. The previous window appears. Enter another delivery, or click **Cancel** to exit.
6. The delivery is automatically set to the *Returned* state. It will become *Verified* once the file is re-filed 145 in its box or shelf location.

5.4.6.4 Performing an "Imaging on demand" delivery

Imaging on demand orders are processed much as any other order would be. Once the delivery slip has been printed, the delivery is processed as follows:

1. Open the **Orders->Imaging on Demand** module.

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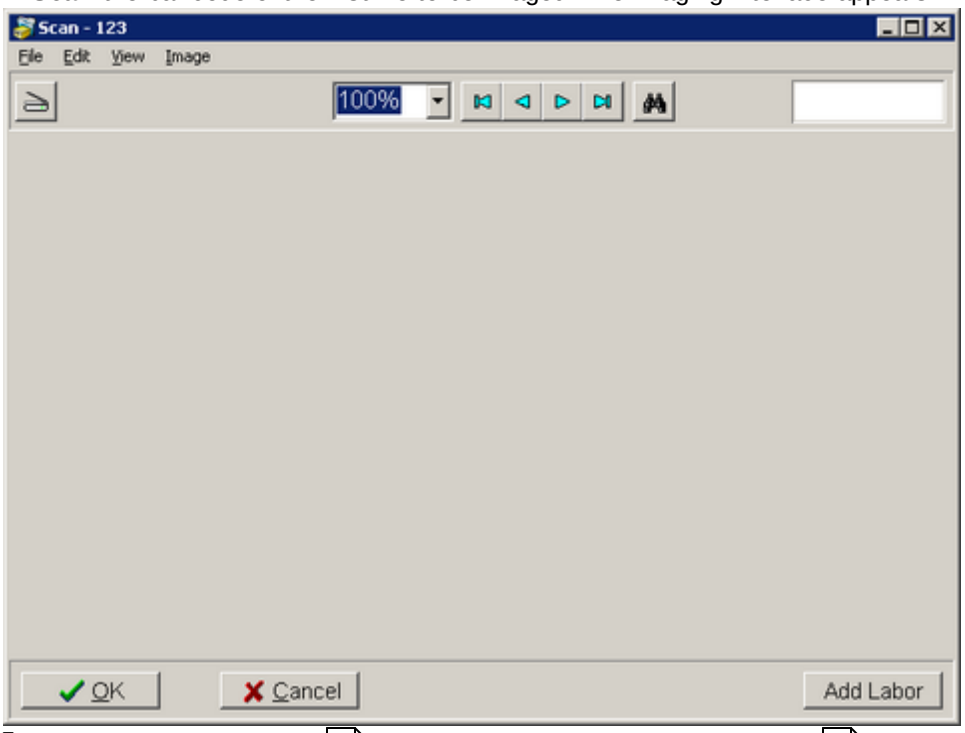
2. Select the transit locations for the imaging area if prompted
3. When prompted to *Select Delivery*, **scan** the delivery slip, or type the delivery number and click **OK**.
4. **Scan** the bar code of the first file to be imaged. The imaging interface appears.



5. Scan items for a delivery 540 (one can also edit the scanned images 341 and import other images 347)
6. When everything is finished, press **OK**.
7. A confirmation message appears : "Save images will become permanent. Confirm ?", press *Yes* to continue.
8. Scan any additional files on that delivery by repeating the above steps, or click **Cancel**.
9. A confirmation message appears : "Is the delivery completely scanned ?", click **Yes** to terminate the operation.

Notice of the delivery is sent by email to the customer, to the e-mail address of the user associated with the order. (This e-mail includes information about the files scanned and a link for logging into ActiveWeb.)

The delivery is automatically returned, and files may be re-filed 145 according to standard procedures.

5.4.7 Receiving operations

5.4.7.1 Returning deliveries with the PDT

Items arriving at the record center should be processed IN as soon as practical, so that they become available to customers should they wish to order them again. This process is known as returning deliveries.

Deliveries may be returned directly directly through the software or using the PDT. For instructions on returning a delivery through the software, see Returning a delivery 549. Returning a delivery with the PDT may start at the customer site if you perform delivery with PDT, or it may be done through

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the same sequence of steps with the PDT, performed at the record center:

To return a delivery using the PDT, without any outgoing items:

On the PDT:
1. From the main menu, press **3**-Processing, **4**-Del/Ret (delivery/return)
2. **Scan** the **delivery slip** of the delivery to be returned.
3. **Scan** the **transit location label** for the receiving area, or press) to skip.
- Press **1** to scan boxes. **Scan** all **boxes** for the return, then press **0** and **Enter** to return to the previous menu.
- Press **2** to scan files. **Scan** all **files** for the return, then press **0** and **Enter** to return to the previous menu.
4. Press **0** to Quit when there are no more types of items to scan on the delivery.
5. Press **0** to not print any receipts
6. Repeat for all deliveries, then press **0** and **enter** when no deliveries remain to be returned.

To upload the results to EDC:
1. On the compupter, open the **Orders->Return Delivery**.
2. From the menu, select **File->Upload return delivery list from PDT**.
3. Place the PDT in the cradle, ensuring that the green light on the base is on and the black UV windows are aligned for communication.
4. On the PDT, press **2** -Send results, **4** -Delivery / Return, **1** -All
5. Once communication is completed, EDC will ask you whether each return is complete. If there will be no more items to add, click **Yes**. (There will be additional steps if a box requires file tracking 143.)
6. EDC will ask you whether to print a refile list for each delivery. The answer to this question will depend on how you operate, but is generally **No**.

If there were errors for a return - such as unrecognized bar codes, the status of the delivery will be *"Delivered"*, allowing you to return the delivery manually in the system and correct any errors.

If there were no errors and you told the system that the return was complete, the status of the delivery will be *"Returned"*, and will go to *"Verified"* once all items have been moved to final locations.

Related topics:
Next steps:
- Returning boxes with file in box tracking 143
- Preparing boxes for reshelving 145
- Preparing files for refiling 145

For more details, see
- Returning a delivery 549
- Adding or removing items from a return 551
- Uploading a return from the PDT 557

5.4.7.2 Returning boxes with file in box tracking

When an account is configured for File in box tracking in the Customer module, when a box arriving at the record center contains inventoried files, the files in the box must be confirmed at a workstation.

When a delivery return is uploaded from the PDT to the workstation, a report will be displayed if some boxes on the delivery return have files that require scanning.

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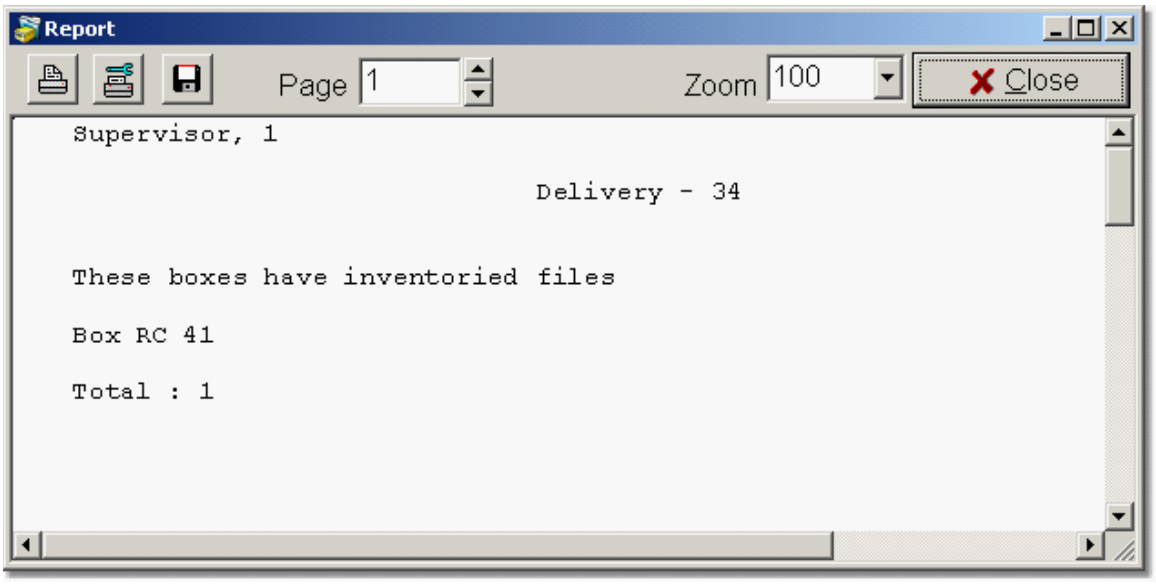
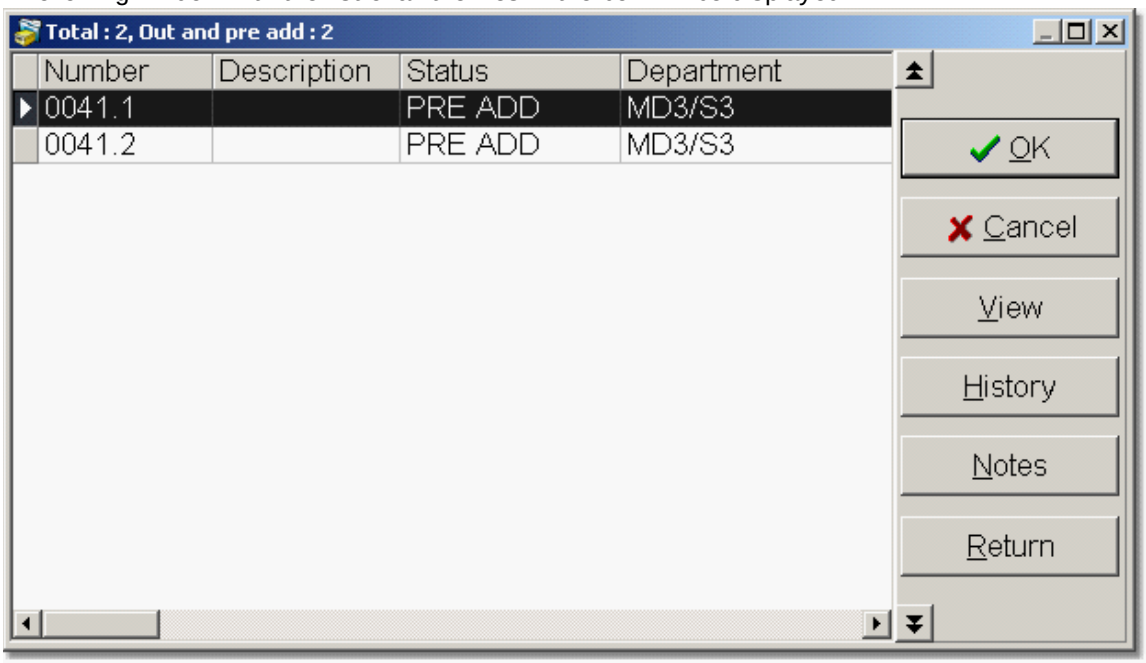


Notice the number of the delivery, as well as the RC number of the box. To finish returning this delivery:

1. Locate the box with files to be scanned, and bring it to a workstation that has a bar code scanner (this is different than the PDT.)
2. In the **Orders->Return Delivery** module, press **F2**, or from the menu, select **File->Return Deliveries**.
3. Enter the delivery number, by scanning the delivery slip or typing the number.
4. Confirm the number of items returned.
5. **Scan** the bar code of the **box**.
6. **Scan** the bar code of each **file** in the box.
7. If some files belonging to the box have not been scanned, the following window with the list of all the files in the box will be displayed:



Pressing the **Return** button on this screen will return the files that are highlighted.

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8. When done, click **Okay**, and continue closing the return.

5.4.7.3 Re-shelving boxes

The re-file process for boxes is done in two steps. The first step is to move the boxes from the transit location to a holding location. The holding location will be an easily accessible location at the receiving area of the record center. Different holding locations are required for all sizes of boxes that the record center can accommodate.

While it is possible to move an item directly to a final location once it has been returned, moving it to a holding location has several advantages:

1. It confirms the size of any new box immediately, so that invoicing will be accurate even if new boxes are not all re-shelved by month end.
2. Sorting items by box type into convenient batch sizes for re-shelving provides a convenient method for ensuring that no boxes were missed in scanning to the shelves.
3. The second move provides confirmation that the size of the box and the size of the location are correct.

The sizing of a box technically only applies to new boxes, but since it is not known which boxes are new and which boxes are returning by visually inspecting them, for consistency, the procedure is identical for all boxes.

To move boxes to a holding location:
1. Select a holding location (sizing cone) of the appropriate size.
2. On the PDT, press **3** Processing, **3** Move, **4** On Shelf
3. **Scan** the destination **location** to "open" the location
4. **Scan** all **boxes** to that location
5. **Scan** the **location** again to close it
6. Repeat for each holding location
7. Press **0** then **Enter** to quit when done

Next, send the results to the computer.
Once items have been scanned to a holding location, the orange cone on the boxes may be used to indicate that they are ready to be re-shelved.

To move boxes to a final location:
- Perform a move using the PDT, using the same steps as above
- After uploading the move list

To verify that all items in the re-shelving batch were scanned:
1. Open the **Orders->Return Verification** module
2. Press **F2**, or from the menu, select **File->View Items in Location**.
3. **Scan** or type the **location bar code** (emptied sizing cone). The report should be empty. If it is not, identify the missing box and scan it to the appropriate location.

5.4.7.4 Re-filing files

Whereas boxes may be moved to any available location of the correct size, files must typically be re-filed into the correct box, which may have moved while the file was out.

As with picking, re-filing may be done by delivery (versus order), but is most efficiently done in larger batches. Therefore, a common practice when files are returned is to do as follows:

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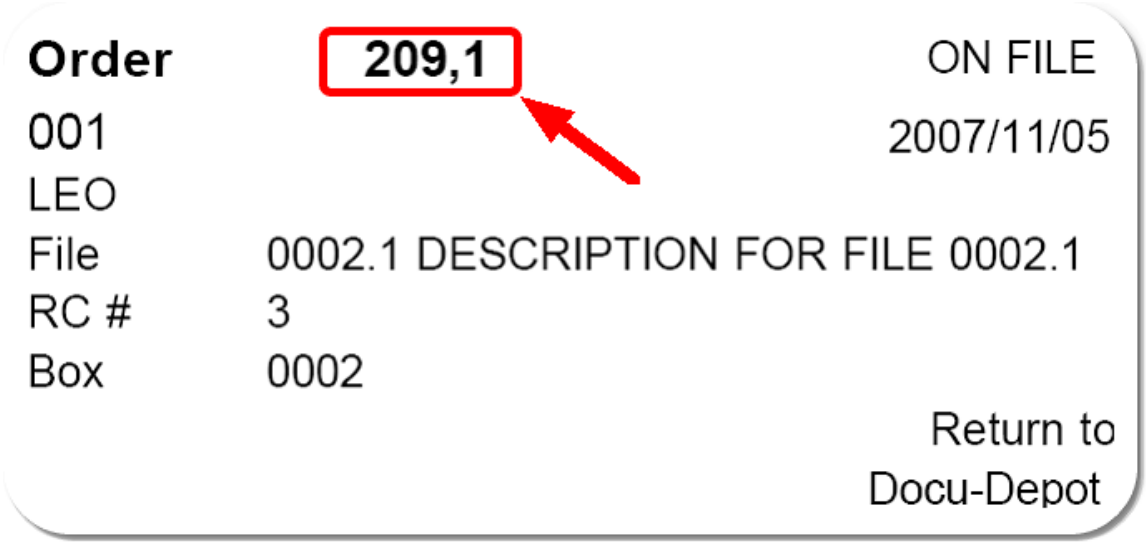
Collect returned files to file transit locations:
Once the file has been returned, perform a move on the PDT to send it to a file transit location.
Note: If a box containing the file is ordered, you will be directed to retrieve the file from the transit location. If the file is ordered, the picking list will also guide you to the transit location to retrieve the file.

1. Select the appropriate file transit location. You may chose to sort files into bins based on the picking level of the source box. Depending on how your system is configured, the original location of the box may be printed on the file picking label.
2. On the PDT, press **3** Processing, **3** Move, **4** On Shelf
3. **Scan** the destination **location** to "open" the location
4. **Scan** all **Files** to that location
5. **Scan** the **location** again to close it
6. Repeat for another location if necessary
7. Press **0** then **Enter** to quit when done

Send the results to the computer, uploading the move list to the **Orders->Return Verification** module.

Re-file the files using File Re-file with PDT.
Once you have collected enough files to refile efficiently, the next step is to sort the files so that you can easily pick the correct file to refile out of the stack of files being put away.



1. Select a stack of files and sort it by the Order and Item number (indicated in red above).
2. On the PDT, from the main menu select **3** -Processing, **5** -File refile.
3. **Scan** the bar code of each **file** to be re-filed.
4. Press **0** -Quit after scanning the last file in the batch.
5. On the computer, open the **Orders->Return Delivery** module.
6. From the menu, select **File->File refile with PDT**.
7. Place the PDT properly in the cradle and press **Enter** once the computer is ready. The computer will upload the list of files, process it, then download the refile list to the PDT.

Processing a Re-file list
1. On the PDT, press **3**-Processing->**2**-Refile.
2. Select the re-file list by pressing the number, eg. **1** (there is usually just one. The most recently

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downloaded list will have the highest number.)

3. The first item to be refiled, by location order, appears.

- for inventoried files, scan the file, then scan the box followed by the location;
- for interfiles in an inventoried file, scan the file, then scan the box followed by the location;
- for boxes (or tapes), scan the location, then scan the box (or tape);
- for deletion notices for files, scan the out card, then scan the box followed by the location.

Note : When an item is refiled properly the PDT automatically displays the next item. If there is an error when refiling, the PDT gives a warning sound and does not display the next item. It is then necessary to try again to refile the item or to get through the next item by pressing **2** (Nx) and **ENTER**.

4. When all the items have been refiled the PDT goes back to the main menu.

Upload re-file results to EDC:

5. Open the **Orders->Return Verification** module.
6. From the menu, select **File->Upload refile results**.
7. On the PDT, select **2-Send results** ->**2-Refile**, followed by the list number, usually **1**.

5.4.7.5 Verifying that refiling and reshelving were completed successfully

As seen in the sections on Re-shelving boxes 145, scanning the bar code of an emptied holding location is an effective way of making sure that all items in the re-shelving batch were successfully scanned.

A second important technique is to review the status of deliveries. All deliveries should progress to the *Verified* state. The list of "Not Verified" deliveries should be monitored daily, and any surprising results investigated to identify which items were not scanned to a final location.

To view a list of not verified returns

1. Open the **Orders->Return Verification** module.
2. From the menu, select **File->View Not Verified Returns|Print Not Verified Returns**. A window appears and asks to enter an interval of delivery dates.
3. Enter the desired date range and press **OK**. The report is displayed or printed.

Note any deliveries that are not in the expected state. A delivery is not verified until all of its items have been verified to their final location.

To investigate which items are not verified:

4. Open the **Orders->Return Verification** module.
5. From the menu, select **File->View items not verified|Print items not verified**. A window prompts for a range of deliveries.
6. Enter the range of deliveries. To investigate a single delivery, enter the same delivery number in the from and to fields, then click OK. The report is printed or displayed.

Once you have identified the boxes or files that were not scanned, see the section on correcting handling errors 148 for tips on correcting them. Once the items have been scanned to their final location, the return and the items will be verified.

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5.4.7.6 Correcting handling errors

Move errors can be common mistakes for a Record Center, so it is very important to be able to deal with them. Processing errors will appear in the reconcile process error 148 report, and once they have been corrected they should be marked as "handled".

Many situations can cause a move error, here are a few examples.

Example 1: An item has been returned to the record center, it was scanned in the *Return Delivery* module and was put in a transit location. The item was refilled, but the location in which it was put was marked as full in the software, so an error is given after the refilling list is downloaded from the PDT. In this case, one would need to:

In the Management section:

1* Rebuild the Space Usage 454 in order to know if it is only a timing problem (someone was picking a few minutes before and did not download his/her list to the software before the other list was downloaded from the PDT)

In the Inventory section:

2* Search for that specific location in the location module. If the previous step did not change anything in the location, create a report of locations 386 (enter a wide range of locations in order to include as many locations as possible to be able to find the misplaced box or the error).

3* Verify if every location has the right amount of boxes in it. Write down the errors and correct them later or right away.

4* When the box is found, perform a move with the PDT 108.

or

5* Move the box manually, write down the new location. Go in the *Box* module, click on **Edit->Edit** and enter the new location in the *Location* field (this is not recommended and only applies for record centers that do not use the PDT).

Example 2: An item has been returned to the record center, but was not scanned in the *Return Delivery* module. When the box is put in a location and the information from the PDT is downloaded in the *Return Verification* module, the software will say that the box must be IN before putting it in a location. In this case, one would need to :

1* Find the box.

In the Orders section:

2* Re-open a return. 577 in the *Delivery Maintenance* module.

3* Return the box manually 549 in the *Return Delivery* module.

4* Create a refile list 559 in the *Return Delivery* module.

5* Refile the box with the PDT 145 or with a printed refile list.

5.4.7.7 Reconciling process errors

If there is an error in processing items while moving inventoried items around the record center and on deliveries, EDC RC produces error messages so that the errors can be fixed. It is important to reconcile these in a timely manner, so that your inventory and billing will be correct.

This interface enables you to view process errors and verify that they have been handled.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Reconcile process errors**

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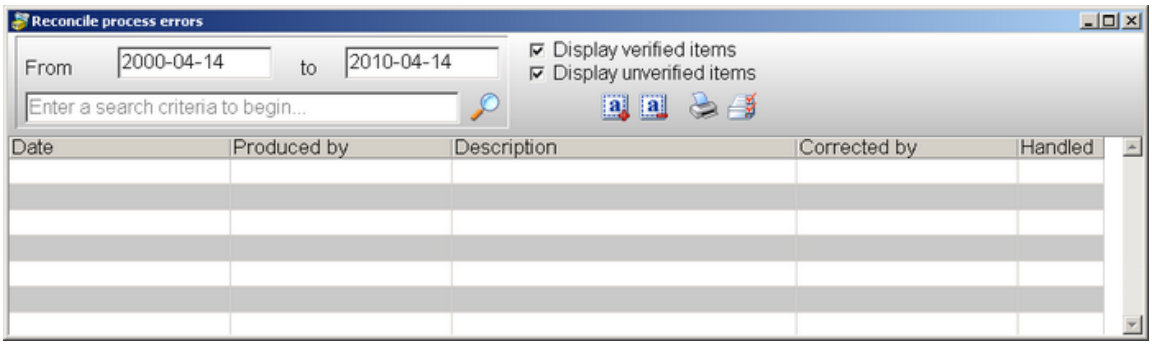

- In the *From* and *To* fields, enter a date range over which to view errors, then click the search glass icon.
- You may limit results by entering search criteria, such as an employee name.
- To display only error that have not yet been handled, ensure that only the "Display unverified items" box is checked.
- To mark errors as verified error, highlight the errors and press [Space]. Pressing the a+ icon will select all times.

5.4.8 Processing withdrawal lists

5.4.8.1 Destroying items

Destroying items by pallet

The disposal of items by the record center requires detailed authorization from the customer. Customers may create and authorize disposal lists using *ActiveWeb*, or these lists may be created in *EDC RC* through the *Disposal list* module, printed and sent to the customer for authorization of each box by the customer. The list is then modified or authorized in EDC. (To authorize disposal, a user must be identified as a list signing officer 277.)

Disposal lists must be created and authorized before performing this procedure.

In the Inventory section:

1. In the Disposal List module, Create 402 | Auto-create 405 | Multi-client Auto-create 405 a disposal list.
2. Create|Print a report 411 for the customer and send it to customer(s)
3. After customer approval is received, authorize the list 409.
4. Create a by-pallet disposal list 406
5. Send the pallet picking list to the PDT 407
6. Pick the items with the PDT 410
7. Receive the pallet picking list from the PDT 408
8. Verify the items with the PDT 410
9. Receive the pallet verification list from the PDT 408
10. An order and a delivery are automatically created for billing purposes.

Note: If a problem occurs while picking, one can reset the pallet picking list 408. The state of the boxes that are on a pallet is changed to OUT after picking and to DESTROYED after the pallet has been verified.

Note: Before destroying items, a delivery type must be created, so the destruction of the

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items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information 202 module.

5.4.8.2 Permanently transferring items to another site

In the Inventory section:

Typically, a customer will initiate the transfer with a request. The record center then generates a transfer list and sends it to the customer. The customer reviews the list, initialling each item and authorizing the list with a signature from a user identified as a list signing officer 277.
Once the any modifications have been made and the list is authorized in

1* In the *Transfer List* module, Create 417 | Auto Create 419 one or many list(s)
2* Create|Print a report 424 for the customer and send it to customer(s)
3* After customer approval is received, authorize the list 422.
4* Create a by-pallet transfer list 420
5* Send the pallet picking list to the PDT 421
6* Pick the items with the PDT 423
7* Receive the pallet picking list from the PDT 421
8* Verify the items with the PDT 423
9* Receive the pallet verification list from the PDT 421
10 An order and a delivery are automatically created for billing purposes.

Note: If a problem occurs while picking, one can reset the pallet picking list 421. The state of the boxes that are on a pallet is changed to OUT after picking and to DESTROYED after all the items on a pallet have been verified.

Note: Before transferring items, a delivery type must be created, so the transfer of the of the items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information 202 module

* steps followed by a star are compulsory

5.4.8.3 Permanently removing items from the inventory

In the Inventory section:

1* In the *Deletion List* module, Create 429 one or many list(s)
2* Create|Print a report 433 for the customer and send it to customer(s)
3* After customer approval is received, authorize the list 432.
4* Process the list 432.
5 A delivery is automatically created for billing purposes.

Note: Before deleting items, a delivery type must be created, so the deletion of the items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information 202 module

Note: When ordering items it is also possible to check the *Permanently Out* check box. As soon as the items will be delivered they will be marked as DELETED.

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* steps followed by a star are compulsory

5.4.8.4 Deleting a box, a tape or a file from the database

This procedure will give you the possibility to delete an item from the database of the record center.

WARNING: When an item is deleted from the database its history is also deleted. One has to be certain of the necessity of the procedure because in case of a mistake the procedure *cannot be undone*. Moreover, the deletion of one item in the database can create problems in relation with other histories (ex: deliveries, orders, etc.). It is better to delete a box by adding it to a deletion list 427 and leave the history in the software, than deleting it completely from the database.
For customers replicated with EDC ActiveFile: if you delete an item from the database at the record center, the item will not be deleted from the database in EDC ActiveFile, since the replication has to do with the history of that item. Since the item is deleted, the software doesn't recognize the changes performed since the box is absent from the database (the comparison between databases is not valid).

1* Make sure you really want to perform this operation.
2* Select the item(s) to delete from the database. Make a list and save it so you know which boxes are deleted.

In the Maintenance section:
3* Go in the *Box and File Maintenance* module -> **Edit** -> **Edit Box|File history**
4* Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
5* Enter the box|file RC number and press **OK**.
6* Select all history containing the ADDED or the IN status (they will appear highlighted when selected) and press the **Delete** button.
7* Go back to the *Box and File Maintenance* window -> **Edit** -> **Transfer Box|File to Pre Add**
8* Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
9* Enter the box|file RC number and press **OK**.
10* The box|file will automatically be transferred to the PRE ADD state.

For files, tapes and boxes without files

In the Inventory section:
11* Go in the *Box|File* module -> Select the box|file to delete -> **Edit** -> **Delete pre add**
12* The box|file will automatically be deleted.
13* Repeat steps one to twelve for each item you want to delete from the database.

For tapes and boxes with files

In the Maintenance section:
14 Go in the Remove PRE ADD module -> **File** -> **By number | Manual selection**
15 Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
16 If you have chosen *By number* : enter a range of Box numbers and press **OK**. A confirmation message appears : " Accept trailing numbers? (Example: 100B1 = 100). Press *Yes* to accept, *No* or *Cancel* to refuse.
If you have chosen *Manual selection* : enter a box number to indicate where to start the list and press **OK**. Select the boxes you want to delete (they will appear highlighted) and press **OK**.
Note: All the files from the boxes(s) will be deleted automatically along with the box.

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Note: If you want to remove all pre adds from the database for a customer (*which is not advisable*), go in the *Maintenance* section in the Remove PRE ADD module -> **File** -> **Delete all "PRE ADDS"**. Select a customer either by entering the customer code or by pressing **OK** to have the list of customers (the customer selected will appear highlighted), and press **OK**. A confirmation message will appear, press *Yes* if you want to go on with the procedure and *No* or *Cancel* to abort the operation.

* Steps followed by a star are compulsory

*** If the customer is still linked by EDC ActiveFile software, it is possible that the deletion of history might not work since an automatic replication of data is done a few times a day. So there is a chance that the history might automatically come back.

5.5 Invoicing

5.5.1 Running Monthly Billing

Billing should be performed systematically and attentively, as it is vital to the relationships between a record center and its customers. Your record center-specific and customer-specific procedures should be well documented in your own manual of standard operating procedures. Use the following as a guideline.

Prepare for billing, and identify which customers require manual invoicing.

1. In the **Orders->Delivery Verification** module, view the **File->Not verified returns** report, and ensure that all deliveries for the period to be invoiced have been returned, and that all new boxes have been properly sized. (Typically by moving them to a permanent location or a holding location with a defined size.)
2. In the **Accounting->Delivery Billing** module, select **File->View|Print report-> Invalid courier quantities** 155. This step is important if any of your customers are billed by container 229. Correct any mistakes.
3. In the **Accounting->Invoicing** module, select **Create->View | Print excluded from selection** 609.

(Note that any invoices for these customers will have to be created individually. In the absence of reasons for requiring manual invoicing, consider setting the *Auto-invoicing* option to *Yes* for these customers in the **Customer->Customer information** module. Information on which customers are invoiced manually should be available and tracked in your operations manual.)

For customers that do not use auto-invoicing:

4. Preview invoices 606 and compare them to invoices from previous months to see if the current total is consistent with the, other totals. If any doubts arise, go see the invoices and figure out the problem.
5. Create invoices manually 593 for these customers (when needed).
6. Verify the invoices to ensure that some costs were not forgotten or mistakenly added.
7. If some errors are found, edit the invoice(s) 595 or edit the items within the invoice(s 603) and reprint them.

For customers that use auto-invoicing:

8. Create an auto-selection of invoices 597. (**Accounting->Invoicing, Create->Auto Selection)**
9. Edit the auto-selection (**Create->Edit Selection**), putting invoices on hold if awaiting completion of work, or confirmation from service record centers.
10. Create the invoices 600 and double-check them for charges that may have been forgotten or

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mistakenly added.

11. When all invoices are correct, print 601 them and send them to your customers (either by email or by mail). The invoices will be printed, along with any attachments specified in the the Customer Information 240 module.
12. When invoices that were on hold are ready, edit the selection to take them off hold, and create, verify, and print the invoices as above.

Note : To send invoices by email, go to the **Customer->Customer Information** module. Click on **Edit**, and in the Billing section, enter one or many email addresses in the "Email" field (if there are more than one, separate them with a comma). Go in the "Invoice format" field and check the "Electronic" box and select the file type (PDF or TIF).

13. View the "Unbilled customers" 610 report.
14. Create invoices manually 593 for any customers that have not been billed.
15. Export your invoices 602 if you use an accounting software.

For service only customers:

16. See the topic Creating service only invoices 610

5.6 Management

5.6.1 Recurring tasks

5.6.1.1 Outline (Recurring tasks)

Maintenance is a key operation in the record center; it generally prevents misunderstandings from happening within the record center as well as between the customers and the record center. These few tasks are used to track and deal with common errors performed by employees, such as scanning a box number instead of a delivery slip or entering the wrong number of returning boxes.

5.6.1.2 Daily maintenance tasks

Daily task sheet: this is used to plan or to organise the work that will be done during the day depending on the various deliveries.

Suggested verification frequency: once or twice a day (ex: once in the morning and once in the afternoon if the Record center makes deliveries twice a day).

In the *Orders* section:

1 In the *Delivery Maintenance* module, click on **File**->**Daily tasks**
2 A window appears. Select a date and press **OK**.
3 The report will automatically be created.

Process errors : Error messages that are displayed on screen during delivery processing and moves are also recorded as process errors. Reconciling process errors 576, using the interface available in the **Orders->Delivery Maintenance** module, File->Reconcile allows you to confirm that each error as been addressed. This should be done by the end of each shift, for example by an operations manager.

Not verified returns: this procedure helps to keep track of problems with deliveries, in order to minimize problems with the inventory of boxes and files.

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Suggested verification frequency: once a day or three to four times a week (or more).

In the *Orders* section:
1 In the *Return Verification* module, click on **File->View|Print not verified returns**
2 Select a date range
3 The report will automatically be created or printed

In this case, there are four possibilities for returns not being verified : the delivery has only been created; the delivery was closed but not delivered; the delivery was delivered but not returned; or the delivery was returned but not verified. One should look at every delivery to find possible errors or problems, but it is easier to concentrate on the deliveries that have been returned to save time.

5 After all the unverified returns are looked at, go in the *Return Verification* module
6 Do a manual verification of all deliveries (see Manually verifying returns 562)

Not verified items: this procedure helps to keep track of problems with deliveries, in order to minimize problems with the inventory of boxes and files.

Suggested verification frequency: once a day or three to four times a week (or more).

In the *Orders* section:
1 In the *Return Verification* module, click on **File->View|Print not verified items**
2 The report will automatically be created or printed
3 Refile the items (with the PDT 145 or with a printed refile list)

Ex: An item has been returned to the record center, it was scanned in the *Return Delivery* module and was put in a transit location. The item was refilled, but the location in which it was put was marked as full in the software, so an error is shown in the report. The item should be located, and refilled properly (see Correcting move errors 148).

***Orders not closed:** this procedure helps to keep track of the deliveries during the day and to reduce the amount of problems an undelivered delivery could create.

Suggested verification frequency: once or twice a day (ex: once in the morning and once in the afternoon).

In the *Orders* section:
1 In the *Orders* module, click on **File -> View|Print Orders -> Orders not closed**
2 The report will automatically be created or printed.
3 Pick the items manually (or with the PDT 133) and deliver the items to the customer manually (or with PDT 138).

Deliveries not delivered: this is used to keep track of deliveries (this procedure is important since an undelivered delivery can cause misunderstandings with the customer whose items have not been delivered.)

Suggested verification frequency: once a day or three to four times a week (or more), usually at the end of the day.

In the *Orders* section:
1 In the *Delivery Maintenance* module, click on **File -> View|Print report -> Deliveries not delivered**
2 The report will automatically be created or printed.

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3 Manually check the different deliveries by going in the *Delivery Verification* module to see the state of each delivery and define the problem.
4 When the problem has been solved, go in the *Delivery Maintenance* module -> **File** -> **Set delivery delivered**
5 Enter the delivery number and press **OK**.
6 The undelivered delivery will be set as delivered.

Items not delivered : this is used to keep track of problems with items within deliveries (this procedure is very important since undelivered item(s) can cause misunderstandings with the customer whose item(s) have not been delivered.)

Suggested verification frequency: once a day or three to four times a week (or more).

1 Go in the *Orders* section -> In the *Delivery Maintenance* module
2 Click on **File** -> **View|Print report** -> **Items not delivered**
3 The report will automatically be created or printed.
4 Manually check the different deliveries by going in the *Delivery Verification* module to view the item within the delivery and define the problem.
5 When the problem has been solved, go in the *Delivery Maintenance* module -> **File** -> **Set delivery delivered**
6 All the undelivered items of the delivery will be set as delivered.

Ex: A driver forgot to deliver an item, but did not mention it on the delivery slip. There will be an error when the delivery is downloaded from the PDT to the system; the item will be marked as "not delivered".

5.6.1.3 Weekly maintenance tasks

Space usage: this is used to update the locations available, to verify the integrity of locations.

Suggested verification frequency: after experiencing technical problems or after manually moving a box to another location.

1 See Recalculating available storage 454

***Invalid courier quantities:** this helps to keep track of errors in the return and delivery module. For example, this is used to know if the final number of returns entered corresponds to the number of items actually returned (this step is particularly useful to make sure everything is billed correctly to each customer, so it would be preferable to perform it.)

Suggested verification frequency: once every week or every two weeks.

In the *Accounting* section
1 In the *Delivery Billing* module, click on **File** -> **View|Print report** -> **Invalid courier quantities**
2 Enter a date range.
3 The report will automatically be created or printed.
4 In the same module go in **File** -> **Select delivery**
5 Enter the delivery number you want to look for and press **OK**.
6 View or Edit the specific details about that delivery (see the Delivery Billing 611 chapter for more details)

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Ex:
A delivery is in the invalid courier quantities report; to know what the error is go in File -> Select delivery.
Enter the delivery number.
Go in File -> Charge summary.
A message appears, in this case there is an "Invalid courier quantity", press OK and the charge summary automatically appears.
Go in View -> Order items | Return items | Courier quantities to see if the amount of boxes ordered and returned correspond to the courier quantities entered. If you are still unsure, go see the printed delivery slip.
In this case the amount of returned items did not correspond to the amount entered in the courier quantities, so go in Edit -> Courier quantities and enter the right amount in the highlighted field.

5.6.1.4 Monthly maintenance tasks

Box, File and Location verification: this type of maintenance is normally used to verify if the importation of data went well, or if the Box and File maintenance module is used a lot, or if boxes, files or locations are often edited manually.

Suggested verification frequency: once every three weeks or every month.

Verify boxes:
In the *Maintenance* section:
1. In the *Box and File verification* module, click on **File -> Verify boxes**
2. A confirmation message for printing appears: "Print report?", press *Yes* to print and *No* or *Cancel* if you do not want the report to be printed.
3. A message appears: "For customer?"
4. Press *Yes* to choose a customer. Enter the customer key in the field and press **OK** or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**.
5. Press *No* or *Cancel* to have the report for all customers. A window appears.
6. Specify the fields you want to verify by checking the check boxes beside each field you desire. Press **OK**.
7. The report will automatically be created and/or printed according to the previous choices.
8. Correct the different mistakes by going in the *Inventory* section in the *Box* module. Select the box you want to edit, click on **Edit -> Edit** and correct the mistake(s) manually. Press on the **Accept** button when all the modifications have been made.

Verify files:
In the *Maintenance* section:
1. In the *Box and File verification* module, click on **File -> Verify files**
2. A confirmation message for printing appears: "Print report?", press *Yes* to print and *No* or *Cancel* if you do not want the report to be printed.
3. A message appears: "For customer?"
4. Press *Yes* to choose a customer. Enter a customer key in the field and press **OK** or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**.
5. Press *No* or *Cancel* to have the report for all customers. A window appears.
6. Specify the fields you want to verify by checking the check boxes beside each field you desire. Press **OK**.
7. The report will automatically be created and/or printed.
8. Correct the different mistakes by going in the *Inventory* section in the *File* module. Select the file you want to edit, click on **Edit -> Edit** and correct the mistake(s) manually. Press on the **Accept**

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button when all the modifications have been made.

Verify locations:
In the *Maintenance* section:
1 In the *Box and File verification* module, click on **File -> Verify locations**
2 A confirmation message for printing appears: "Print report?", press *Yes* to print and *No* or *Cancel* if you do not want the report to be printed.
3 The report will automatically be created and/or printed.
4 Verify the locations manually to make sure that the report is correct. Correct the mistakes manually by going in the *Inventory* section: in the *Locations* module click on **Edit->Edit** and perform the changes. Press the **Accept** button.
5 Go in the *Rebuild Space Usage* module and rebuild the space usage 454.

5.6.1.5 Accounting tasks

Once every week/two weeks

Preview invoices : This is done to make sure that some mistakes have not already been made or to report to the customer the approximate cost of the services given for a certain period of time.

In the *Accounting* section:
1 In the *Invoicing* module, click on **File->Preview invoice**
2 Enter the customer key or press **OK** to have the list of customers (select a customer in the list and it will appear highlighted) and press **OK**.
3 Enter the invoice date in the field.
4 Select what type of invoice you want (Rent and Service | Service only | Rent only)
5 Enter a date range for the "Service from" and "Rent from" fields.
6 When all the information has been entered, press **OK**.
7 A preview will automatically be created.

Preview invoice totals : This is often done to preview the approximate revenue of the record center at the end of the month. One should run the Invalid courier quantities 155 report before previewing the invoice totals, since it has an impact on the accuracy of the report.

In the *Accounting* section:
1 In the *Invoicing* module, click on **File->Preview invoice totals**
2 Select a building from the list (it will appear highlighted) and press **OK**.
3 The report will automatically be created.

Once every week/two weeks and before billing

Invalid courier quantities: 155 This is done to make sure that mistakes have not slipped in right before billing. It is also to make sure that customers are billed correctly. This only applies to customers that a billed using the Container courier billing method, without the automatic container option turned on.

Before billing

View excluded from selection : This is a list of customers for which the invoicing must be done manually.

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In the *Accounting* section:
1 In the *Invoicing* module, click on **Create->View|Print excluded from selection**.
2 The report will automatically be created.

View unbilled customers : This is done to know which clients you want to bill and if you must bill them (this is mostly a way to plan out your invoicing, and to know what is ahead of you in the following months.)

In the *Accounting* section:
1 In the *Invoicing* module, click on **Create->View|Print unbilled customers**.
2 Select an invoice date.
3 The report will automatically be created.

After billing

View unbilled customers : This is done to make sure that you have billed all the clients you needed to bill.

In the *Accounting* section:
1 In the *Invoicing* module, click on **Create->View|Print unbilled customers**.
2 Select an invoice date.
3 The report will automatically be created.

Verify that E-mailed invoices went through: Invoices sent will be copied to the Invoice email BCC address 205, and any delivery failure notices will be sent to the Invoice email Reply to address 205. Check for messages at both of these e-mail addresses.

6 Software reference manual

Enter topic text here.

6.1 The main window

6.1.1 Overview (Main Window)

The *Main window* is the most general window in EDC, and contains the various modules. This window also has menu options

Window elements:
- Accounting tab: Modules associated with accounting 159
- Inventory tab: Modules associated with inventory management 161
- Orders tab: Modules associated with orders 162
- Maintenance tab: Modules associated with maintenance 164
- Customer tab:Modules associated with customer management 165
- Management tab: Modules associated with record center management 166
- Opened modules

Menu options:

File menu

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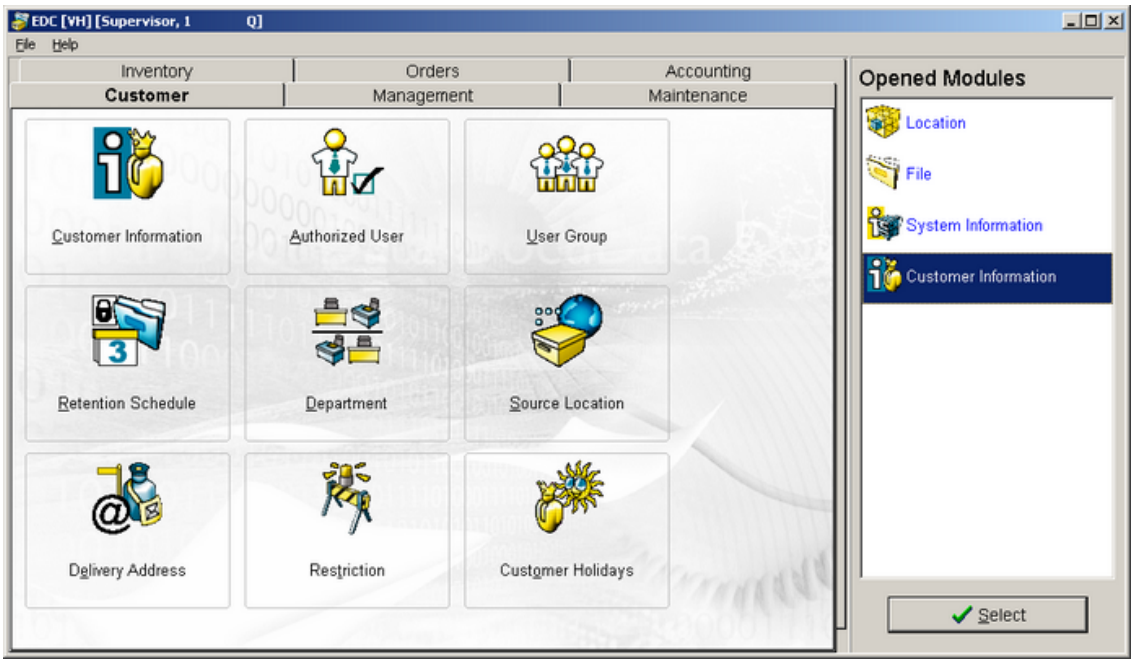
- Thermal label options 167
- Simple interface 168
- Active web sessions 168
- Exit 167

Help menu

- Contents 169
- Change language 169
- View error log 169
- About 169
- Who am I? 169
- Resources 169

Main window:



6.1.2 Modules associated with accounting

Modules on the accounting tab support automated invoicing procedures within *EDC*.

Invoicing 590 **module**

Create, edit, review, and print invoices. You may create blank invoices, individual invoices, or batches of Auto Invoices based on customer-specific parameters.

Delivery Billing 611 **module**

View and modify charges associated with individual deliveries, so that the invoice based on these deliveries will be accurate at billing time.

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Delivery Type 621 **module**

Configure the behavior and pricing of each delivery type.

Box Type 625 **module**

Define the volume, price codes for various operations, and number of boxes on a pallet for each box type.

General Pricing 632 **module**

Establish and manage price codes used in mapping all of the billing behavior in EDC. Various parameters of a price code affect the description that appears on the invoice in each language, pricing and discounts, and how each price code can be used.

Customer Pricing 640 **module**

Override the pricing and description of price codes for individual customers. Apply global rate adjustments.

Periodic Invoice Item 646 **module**

Specify recurring costs to be added directly to the automatically-created invoice. Daily, weekly, monthly, and annual charges are possible.

Departmental Invoicing 649 **module**

Configure invoicing behaviour for specified groups of departments for customers with departmental billing 227, leading to invoices separate from the global invoice for these (groups of) departments.

Customer Volume Usage 653 **module**

View various summary reports of the volume of boxes stored for customers, broken down by different criteria.

RimsLink Pricing 656 **module**

Map price codes for invoicing of customers shared with other record centers.

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6.1.3 Modules associated with inventory management

Modules on the inventory tab support the management of a record center's inventory.

Box 307 **module**

Create, consult, and manage records of box information, including notes. Print reports and labels, and view a list of inventoried files in the box.

File 307 **module**

Create, consult, and manage records of file information. Print reports and labels, and access images associated with the files.

Search 349 **module**

Locate box and file records using various combinations of criteria.

Rotation Schedule 357 **module**

Schedule delivery dates for specific items, typically data storage tapes.

Full text search 361 **module**

Find box and file records containing specific words.

Report 364 **module**

View, modify, and create customized reports.

Location 376 **module**

Manage the locations used to store boxes at your off-site record center.

Shelf Location 387 **module**

Manage locations used to store files on open shelves at your off-site record center.

Activity Report 394 **module**

Consult or print reports of specified activity types over a specified date range, and print of overdue memos for boxes or files OUT to users.

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Disposal List 399 **module**

Manage the disposal of boxes (destruction, revision, send to depot, etc), according to the demand of the customer, following a rigorous procedure to protect against error.

Transfer List 415 **module**

Transfer documents from the inventory of your off-site record center to an external site.

Deletion List 427 **module**

Cancel future storage charges for boxes that a customer indicates will not return, marking them as DELETED. Files may also be deleted. It is possible to reactivate deleted items.

Internal Transfer Lists 434 **module**

Move items systematically from one area to another within your record center, for example while renovating or reorganizing.

Internal Note 441 **module**

Record and consult notes about boxes and files for record center use. These are not visible to the customer.

Shredding Container 442 **module**

Manage inventory levels of shredding containers, and pricing for emptying and container rotation services.

6.1.4 Modules associated with orders

Modules on the *Orders* tab permit and support the circulation of documents between the customer and the record center.

Orders 501 **module**

Place new orders and consult details about existing ones, including their status, items, recipient, and requested delivery date, type, and address.

Picking List 526 **module**

Process picking lists for items on regular orders, for a specified delivery date or order number.

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Delivery Creation 532 **module**

Create deliveries. If the Order Grouping 235 option for a customer is set to YES, multiple orders delivered to the same address at the same time with compatible delivery types will be grouped on one delivery.

Delivery 534 **module**

Consult the information about deliveries and add items to CREATED or CLOSED deliveries.

Imaging on demand 539 **module**

Deliver documents to customers as scanned images (typically over ActiveWeb) rather than physically bringing them to the customer.

Return Delivery 548 **module**

Perform the return of a delivery, bringing items into the record center, with the option of adding various services and charges.

Return Verification 561 **module**

Verify that all returned items have been brought to permanent locations, and upload standard move and refile operations from the PDT 104 (Portable data terminal).

Non Track File 564 **module**

Consult information about auto inventoried files that were ordered but not found in boxes. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Shelf Non Track File 566 **module**

Consult information about auto inventoried files that were ordered but not found in open shelf filing. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Delivery Imaging 567 **module**

Scan and consult delivery and return slips, as a record of delivery details including customer signatures. Customers can consult these images on your ActiveWeb page.

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Delivery Route 543 **module**

Manage deliveries by grouping them into delivery routes, assigning a vehicle and driver, ordering the delivery addresses, and performing 'truck validation' to ensure that the necessary items are on the truck before the driver leaves. Print a report of addresses on a delivery route.

Deleted Order Item 573 **module**

View items deleted from orders, including the time of the deletion and the employee who took the order.

Delivery Maintenance 575 **module**

Perform various maintenance operations related to deliveries, and produce daily task sheets listing deliveries to return, items to refile, and outstanding disposal and transfer lists

Recurring Orders 583 **module**

Specify parameters of orders to be created automatically by the system according to a predetermined pattern.

6.1.5 Modules associated with maintenance

The maintenance tab contains modules used for maintaining smooth operations at the record center. They are grouped separately for security reasons, as some of these functions bypass the procedures and safety features built into EDC.

Box and File Verification 446 **module**

Verify the integrity certain fields in the database. For example, re-calculate the number of boxes in each location to see if it matches what is reported.

Department Transfer 450 **module**

Transfer the records of an entire department or sub-department to another department or sub-department of the same customer.

Rebuild Space Usage 454 **module**

Update the number of boxes in each location, or systematically re-scan your inventory.

Remove PRE ADD 464 **module**

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Remove one, multiple, or all records of documents in PRE ADD from the database for a customer.

Box and File Maintenance 467 **module**

Perform various powerful maintenance tasks on the records of boxes or files. Access to this module should be carefully limited, as this module enables users to bypass some of EDC's processes in ways that may affect the accuracy of many records.

6.1.6 Modules associated with customer management

The Customer tab contains the modules to configure most customer-specific parameters, with the exception of customer pricing.

Customer Information 223 **module**

Configure most parameters for a customer. It is possible to override many default parameters established in the system information module, including record center business hours and picking times.

Authorized User 275 **module**

Manage access parameters of customer's authorized users.

User Group 283 **module**

Manage the access parameters for roles that can be assigned to authorized user.

Retention Shedule 286 **module**

Create and manage document types for a customer. If a customer's retention policy is based on document type, parameters in this module determine when and how a document is eligible for disposal.

Department 292 **module**

Manage departments and sub-departments for each customer. Each document must have a department and sub-department. Department can be used in calculating billing, calculating retention, and restricting access to information by authorized users.

Source Location 298 **module**

Manage the list of the source locations that a customer can assign to a box.

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Delivery Address 300 **module**

Manage one or more delivery addresses per customer.

Restriction 303 **module**

Manage restrictions to prevent inclusion of a specified document type on disposal lists though their disposal dates have past. This is typically used in the case of an audit.

Customer Holidays 305 **module**

Specify customer holidays, to prevent delivery attempts on these days.

6.1.7 Modules associated with record center management

The *Management* tab contains modules that relate to the management of the record center as a whole.

Employee 170 **module**

Configure the behaviour of the system for each record center employee, including their access rights.

Employee Group 177 **module**

Define the module access required for different roles in the record center. Assigning a role (employee group) to an employee grants them all of the specified access rights, thereby speeding up the management of employee access rights.

Delivery Vehicle 181 **module**

Create a list of delivery vehicles available. These are used in the *Delivery Route* module.

Business Type 183 **module**

Create a list of customer business types. These are applied in the customer information module, and can be used in various reports for analyzing patterns by business type for strategic purposes.

Holiday 184 **module**

Specify record center holidays, so that deliveries are not scheduled for these dates. When serving tape rotation clients, it is necessary to enter holidays for at least as far in advance as customers schedule their tape rotations. (eg. 5 years)

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Building 185 **module**

Configure building-specific parameters for the buildings used for storage by your record center.

Dictionary 190 **module**

Modify the terminology used by the record center in EDC, and for customers on ActiveWeb. The system supports two languages. The default dictionary is English and French.

Access Log 193 **module**

View intervals of access to the system by employees through EDC RC and by customers through ActiveFile. Terminate active sessions if necessary.

System Information 195 **module**

Configure parameters that apply to the whole system (eg: the date format, and the picking hours for orders.)

Customer Export 219 **module**

Extract data for a customer, typically for setting the customer up with ActiveFile software.

Customer Purge 221 **module**

Permanently remove inventory data for a customer from the main database. (This is rarely used)

6.1.8 File menu options

To change label options with old thermal printer drivers: - obsolete
With newer printers that make use of windows printer drivers, these settings do not apply, and you have far greater freedom to configure thermal label templates 213.

With older printers that print through a direct serial connection, labels are limited to several pre-configured formats. This menu option permits you to changes which formats are selected for the current session. When EDC is exited and re-started, it will revert to the default settings in the System information module.

To select a different template for the current session:

1. From the *Main Window*, click **File->Thermal label options->Box | File | Picking**. A window appears:

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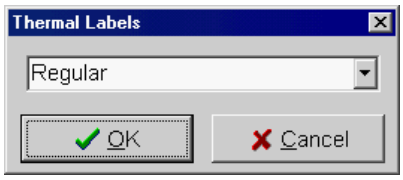


2. Click on the **drop-down button** and to choose one of the available formats, then click **Okay**. For details on these formats, see the topic on box label formats[199] in the System Information module.

To use simplified graphics in EDC:
The simple interface eliminates some of the graphics from the standard EDC interface, making EDC run faster over remote connections such as Citrix. To activate the simple interface:
1. From the *Main Window*, select **File->Simple Interface**

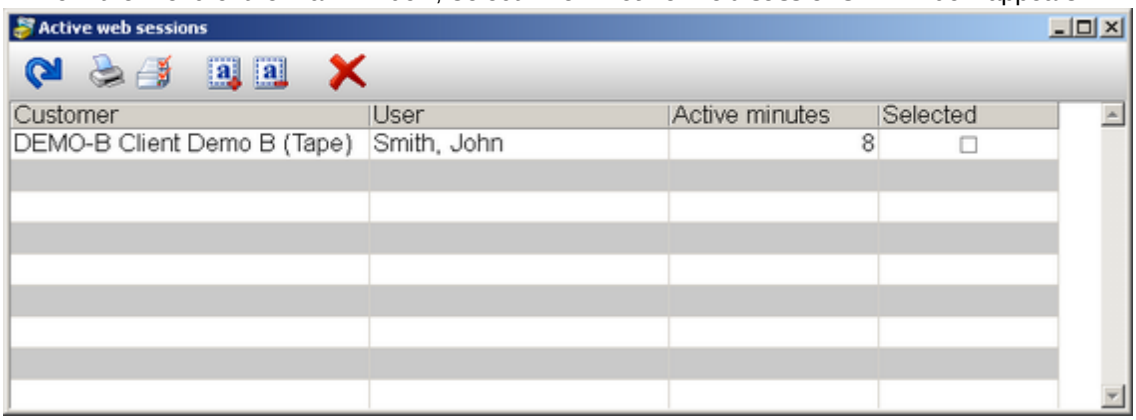
To end the current session of EDC:
1. From the *Main Window*, press **Alt+F4**, or select **File->Exit**.

Note that pressing **Alt+F4** or selecting **File->Exit** from within a module window will close the module rather than the session of EDC.

6.1.9 Managing active web sessions

The active web sessions interfaces allows you to see who is connected to ActiveWeb, and if necessary, terminate selected sessions. This can be useful for performing maintenance or for assisting customers if all their web licenses are in use.

To view or terminate active web sessions
1. From the menu of the main window, select **File->Active web sessions**. A window appears.



2. You may sort by any column by clicking the header. For example, if you are searching for a session that has been active a long time, sort by the Active minutes column.
3. If you wish to terminate one or more sessions, select them by clicking in the **selected** column, then click the red **X**. A window appears

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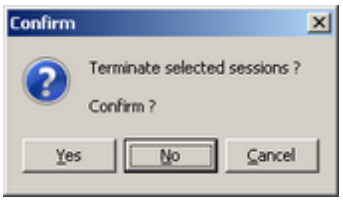


4. Click **Yes** to terminate the session. The session will be terminated and will no longer appear in the list of active web sessions.

(**Note:** If a customer attempts to work with a terminated web session, they will get an error message that their session has expired.)

5. Close the window when finished.

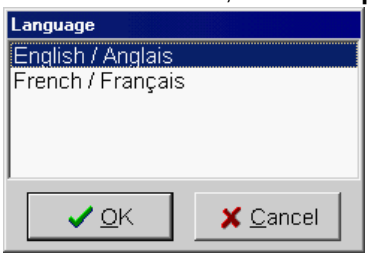
This function requires the Web RPC server setting 202 in the **System Information** module

6.1.10 Help menu options

Help->Contents
Pressing **F1** from a module window will typically open the help manual to the topic for that module. In contrast, selecting **Help->Contents** from most windows in EDC will open the help manual to the table of contents. From here, it is possible to search or browse for the desired topic.

Help->Change Language
To toggle between the available languages for the current session of EDC:

1. From most windows, select **Help->Change Language**. A window appears:



2. Select the desired language, and click **Okay**.

Note that the language settings can be specified for each employee in the Employee module 172.

Help->View Error Log
This option creates a report of errors occurring over a specified date range. This can be very useful in trouble-shooting exceptions and ensuring that the source is addressed.

Help->About
This displays the EDC version number, the number of licensed users, the options activated with the current edition (OCR, replication, imaging, invoicing, advanced modules, etc.), and the current and available box count.

Help->Who am I?
Displays who is currently logged into EDC, and the start time of their session. This is also displayed on the title bar of EDC, as well as with the application name in the windows taskbar.

Help->Resources
Displays system information. As a general rule, the following minimal values are requested to insure the proper functioning of the system:

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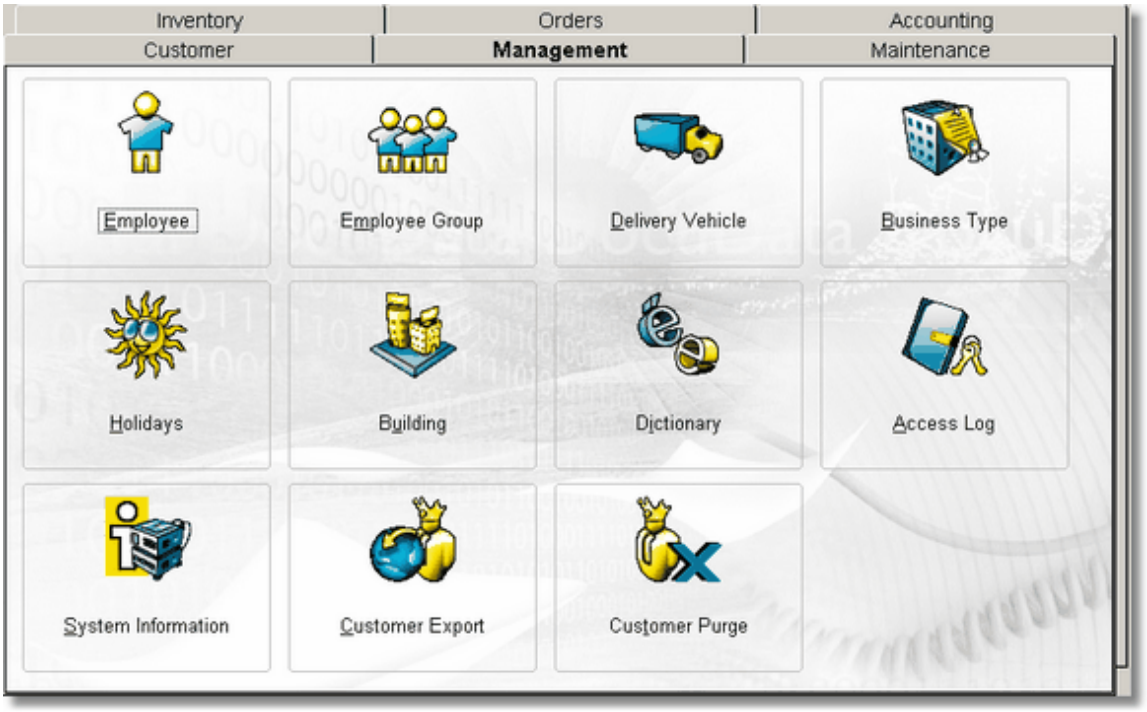
Available Memory	1,000,000 bytes
Disk Space	10 Megabytes
Database level	Must match the EDC applications

6.2 Record Center Management (Management tab)

6.2.1 Outline (Management)

Modules on the *Management* tab generally apply to the record center as a whole.



Modules

- Employee 170
- Employee Group 177
- Delivery Vehicle 181
- Business Type 183
- Holidays 184
- Building 185
- Dictionary 190
- Access Log 193
- System Information Module 195
- Customer Export 219
- Customer Purge 221

6.2.2 Employee

6.2.2.1 Overview (Employee)

This module is used to manage all the employees of the record center. An employee can be created separately, having a personal password and specific access rights to the system,

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according to his/her responsibilities at the record center.

The main interest of this module is the allocation of specific access rights to the system for each employee.

Available reports
- List of employees

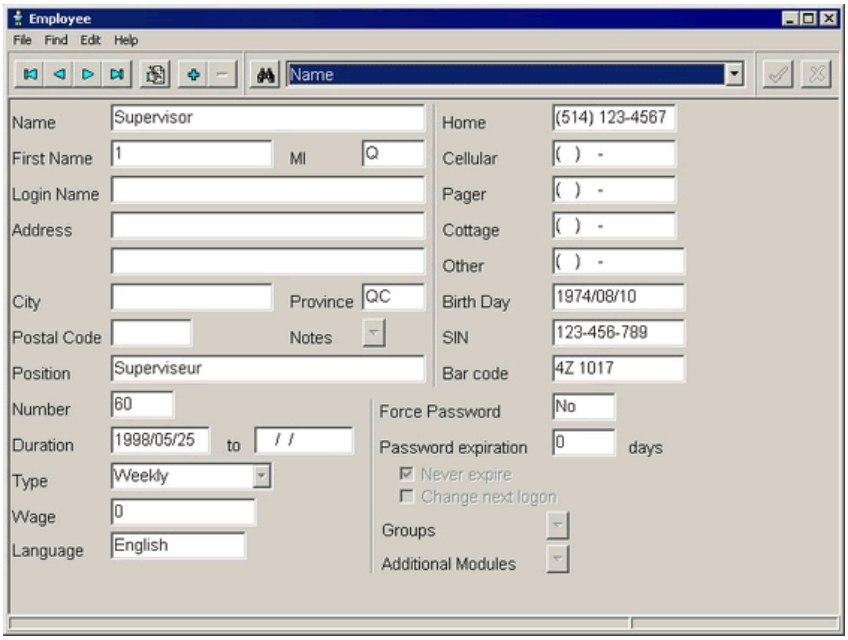
Fields[172] **(see the next section)**

Tasks
- Creating a new employee[173]
- Adding or editing access rights for an employee[173]
- Adding or editing password for an employee[175]
- Deleting an employee[176]
- Viewing or printing the list of all employees[176]
- Printing an employee bar code[177]
- Reactivating the profile of an employee[177]

Distinctive menu options:

Edit menu
- Password[175]

Module window:



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6.2.2.2 Fields (Employee)

Name / First Name
These fields allow the identification of the employee.

Login Name
Login name.

Coordinates
Contact information of the employee. These are for reference purposes.

Position
This field indicates the occupation of the employee at the record center.

***Bar code**
A bar code is automatically assigned to any employee added in the system. When a record center uses I.D. cards, the bar code may appear on these cards. Furthermore, this bar code must be scanned any time a PDT[104] is used, in order to identify the employee who is performing the operation.

Number
This number is automatically generated by the system for this specific employee.

Duration
This field allows to enter a range of dates for which the employee is active at the record center and has access to the system. This can be useful for temporary employees in order to insure that they will not have access to the system at the end of their engagement period.

Note that repeated entry of incorrect passwords causes an employee profile to be made inactive by automatically setting the end date to the present date.

Type
Drop-down field that can contain "Hourly", "Weekly", "Annually" or "By Contract".
This field indicates the type of payment given to the employee.

Wage
This field indicates the salary paid to the employee for a payment period. This field is related to the previous field.
For example, when the *Type* field is set to "Weekly" and the current field is set to "400", it means that the employee gets 400$ for each week of work.

Language
Choice field containing "English" or "French" (if the default dictionary is installed).
This is the language used in the system by the employee. When an employee accesses the system, all the information is displayed in the language specified in this field.

Note : The language can be changed in any module by clicking on **Help**->**Change Language**.

Force Password
Choice field containing "Yes" or "No".
When this field is set to "Yes", the employee has to enter a password in order to access the system.

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Password Expiration
This field allows to set a delay when the password will be expired. This occurs only when the previous field is set to "Yes". Alternatively, the password can be set to **Never Expire**.

Change next logon
Check this box if you wish to have the employee set their own password the next time they log in to the system. They will be prompted to enter their current or temporary password, then enter and confirm a new password. This box is automatically unchecked when the employee changes their password.

Groups
Drop-down field associated with a list defined in the *Employee Group* 177 module.
This field allows to include an employee in many employee groups so that he/she will have the same access rights as the selected groups.

Additional Modules
Drop-down field associated with a list defined in the system.
It is possible to add access rights to modules that are not included in the group(s) selected in the previous field.

Commission report access
Checkbox. When selected, this employee will be able to access the commissions report 608 through the file module of the **Accounting->Inventory** module.

6.2.2.3 Creating a new employee

1. Click on **Management**->**Employee** from the *Main window*.
2. Click on **Edit**->**Add**.
3. Enter information in appropriate field 172s (see the previous section for more details).
4. Click on the **Accept** button to finish.

6.2.2.4 Adding or editing access rights for an employee

Employee rights need to be defined once an employee group has been added to the system. The employee group will define which modules and access rights (scroll, edit, add, delete) are available to the employees of a group.

The access rights that can be defined in the Employee module are unique to each employee. This enables the supervisor to customize the rights of an employee, ie, additional access can be granted for certain modules and additional employee groups can be associated.

See the following topics for more information on Employee groups :
- Creating an employee group 178
- Adding or editing access rights for an employee group 178

1. Click on **Management**->**Employee** from the *Main window*.
2. Search for the employee whose access rights must be added or edited.
3. When the desired employee is displayed on the screen click on **Edit**->**Edit**.
4. Move to the *Groups* field and click on the drop-down button to the right of this field. A window appears and contains all the groups already granted to the employee, when the employee was already created

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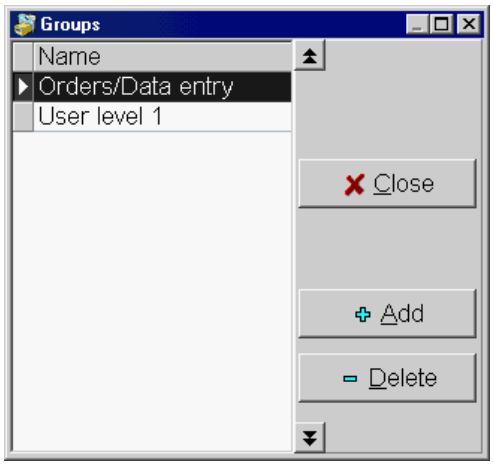
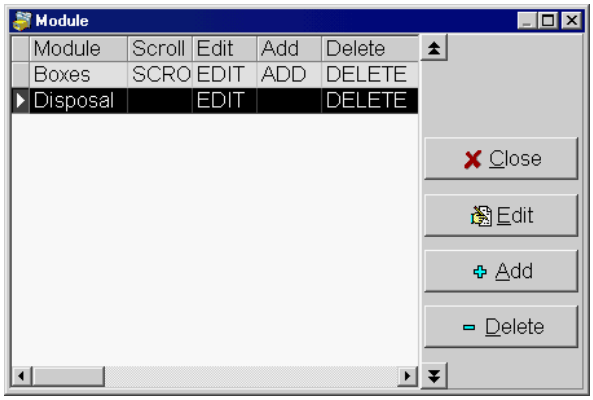


Note : Remember that when an employee is included in a group he has its access rights.

5 Add or edit the access rights of the employee as follows :

- To include the employee in a group, click on the **Add** button, select a group in the list that is displayed and click on the **Accept** button. The name of the selected group will appear in the previous window;
- To remove the employee from a group, select the desired group and click on the **Delete** button. In order to confirm the deletion, press **OK** in the dialog box that appears.

6 Move to the *Additional Modules* field and click on the drop-down button to the right of this field. A window appears, containing the additional modules already granted to the employee.



Note : The words to the right of the modules indicate their access rights.

7 Add or edit additional access rights to the employee as follows :

- To add access rights to a module, click on the **Add** button, select a module in the list and press **OK**. A window appears and allows to specify the access rights to this module.

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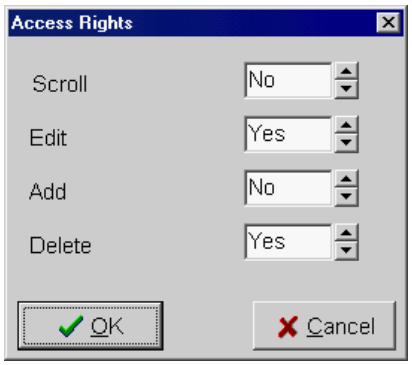


Click on the choice button of each field and set it to "Yes" and press **OK**.

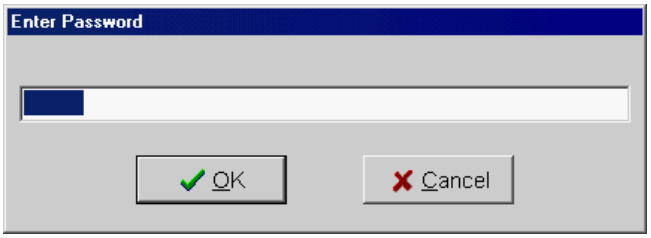
- To remove access rights to a module, select this module in the window opened in **6** then click on the **Delete** button. A dialog box appears in order to confirm the deletion. Click on the **Yes** button to proceed.

- To modify access rights to a module, select this module in the window opened in **6** then click on the **Edit** button. Proceed to the modification as when adding access rights to this module.

8 Click on the **Close** button of the windows opened in **4** and **6** when additions or removals are done, click on the **Accept** button.

6.2.2.5 Adding or editing password for an employee

1 Click on **Management**->**Employee** from the *Main window*.
2 Search for the employee whose password has to be created or edited.
3 When the desired employee is displayed on the screen, click on **Edit**->**Password**. A dialog box appears.



4 Enter a password and press **OK**.

Note : If a password has already been defined for this employee it will be automatically replaced by the new one. Passwords should be 6-16 characters long.

5 Enter once more the password in the window that is displayed in order to confirm the operation and press **OK**.

There is a shorter way to edit the password of an employee : modifying the password when entering the system.

1 Double-click on the ***EDC*** icon to open a new session.
2 Select an employee's name and check off the **Change password** box as follows.

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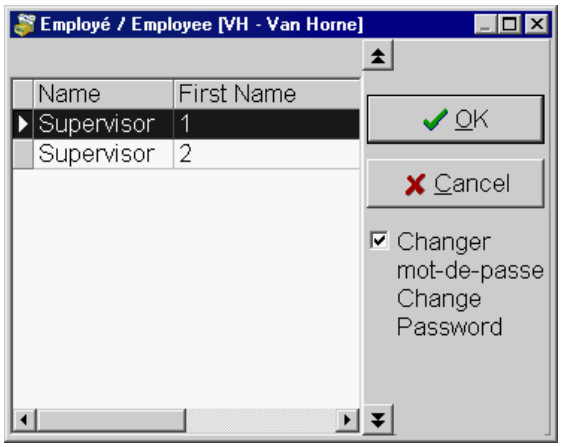
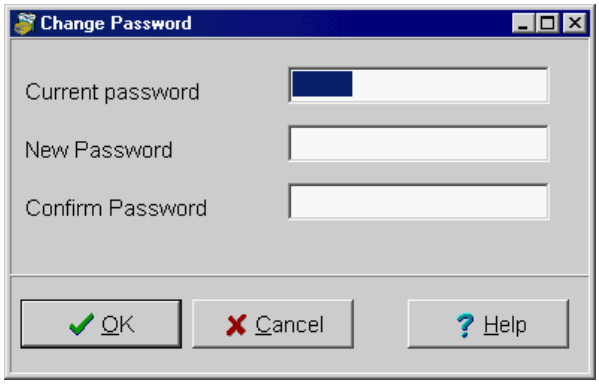


3 Press **OK**. The following window appears instead of opening a new ***EDC*** software session.



4 Enter the requested information and press **OK**.
5 A new ***EDC*** software session opens and the password is modified. This new password will have to be entered when opening the next session.

6.2.2.6 Deleting an employee

1 Click on **Management**->**Employee** from the *Main window*.
2 Search for the employee to be removed and when he is displayed on the screen, click on **Edit**-> **Edit**.
3 Move to the *Duration* field and enter a range of past dates. The employee's name will not appear anymore on the list displayed when opening an ***EDC*** session.

Note : It can be useful to enter a range of dates in the *Duration* field when creating a temporary employee. It will prevent access to the system for this employee as soon as his working contract ends.

6.2.2.7 Viewing or printing the list of all employees

1 Click on **Management**->**Employee** from the *Main window*.
2 Click on **File**->**View Report|Print Report**.
3 The system automatically prints or displays the list of all the employees at the record center.

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6.2.2.8 Printing an employee bar code

In order to use the PDT, every employee is automatically assigned a bar code for security and tracking reasons.

1 Click on **File** -> **Print Thermal Label**
2 The employee label will automatically be printed on the thermal printer.

6.2.2.9 Reactivating the profile of an employee

An employee's access may be removed by setting the end date of their duration of employment 172 to the past in the Management->Employee field. This is what happens if 10 incorrect passwords are entered for an employee within 10 minutes.

To reactivate the employee's profile,
1. Open the **Management->Employee** module.
2. Press **Ctrl-E** to edit.
3. Change or remove the end date in the *Duration* field
4. Press **Ctrl-Enter** or click the green check mark to accept.
5. If necessary, assign a new password 175.

6.2.3 Employee Group

6.2.3.1 Overview (Employee Group)

The Employee Group module permits the management of access rights for a group of employees, based on their roles within the record center. For each module in EDC RC, you can specify whether the group has the right to search (scroll), edit, add, and delete.

Assigning an employee to an employee group gives that employee all associated rights.

An employee with multiple roles may belong to multiple employee groups.

Available reports
- list of employees
- list of employee groups

Fields 178 **(see the next section)**

Tasks
- Creating an employee group 178
- Adding or editing access rights for an employee group 178
- Copying and adding an employee group 180
- Deleting an employee group 181
- Viewing or printing the list of all employee groups 181

Distinctive menu options:

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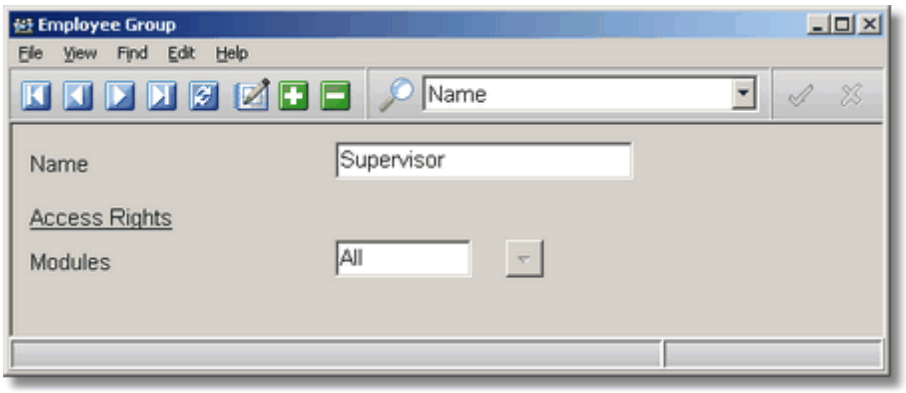
View menu
- View employees 181

Edit menu
- Copy and add 180

Module window:



6.2.3.2 Fields (Employee Group)

Name
Alphanumeric field of 40 characters.

This field identifies an employee group within EDC RC.

Access Rights
Modules
Choice field containing "All", "Partial" or "None".

- All: Provides all access to all modules
- None: Provides no access to any modules
- Partial: Permits selection of access types by module.

(See Adding or editing access rights for an employee group 178)

6.2.3.3 Creating an employee group

1. Click on **Management->Employee Group** from the *Main window*.
2. Click on **Edit->Add**.
3. Name the employee group, and set the access rights to *All* or *Partial*
4. If the access rights are set to *Partial*, select which access rights to add 178
5. Click on the **Accept** button when finished.

6.2.3.4 Adding or editing access rights for an employee group

Note that employee groups are created to provide access rights required to perform a role. If an employee has multiple roles, they will be assigned to multiple employee groups.
See the following topics for more information on employee groups or employee rights :
- Creating an employee group 178
- Adding or editing access rights for an employee 173

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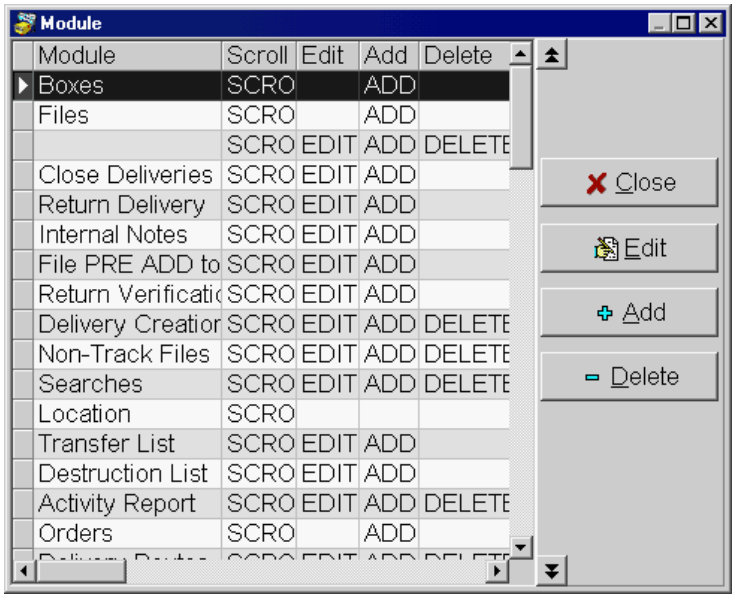
Usually, employee groups are created to fit certain job descriptions (ex: secretary, warehouse employee, driver, warehouse manager, etc.) Each group should reflect the use most of the employees of the group will have for the software.

Here is an example of access rights for a secretary (take note that this might not be adapted to your business' needs) :

MODULE	RIGHTS
Order	Add, Scroll, Edit
Box	Add, Scroll, Edit
File	Add, Scroll, Edit
Delivery Imaging	Add, Scroll, Edit
Recurring Orders	Add, Scroll, Edit
Search	Add, Scroll, Edit, Delete
Full Text Search	Add, Scroll, Edit
Rotation Schedule	Add, Scroll, Edit, Delete

1. Click on **Management**->**Employee Group** from the *Main window*.
2. Search for the employee group whose access rights must be defined or edited.
3. When the employee group appears on the screen click on **Edit**->**Edit**.
4. Move to the *Modules* field, click on the choice button to the right of the field and set it to "All" or "None", depending if the employee group must have access to all the modules or none;
5. To give access to some modules, set the field to "Partial" then click to the drop-down button to the far right of the field. A window appears, containing the modules already granted to the group, including the access rights to these modules.



6. Add or edit the rights as follows :

   - To add access to a module click on the **Add** button. A choice list appears.

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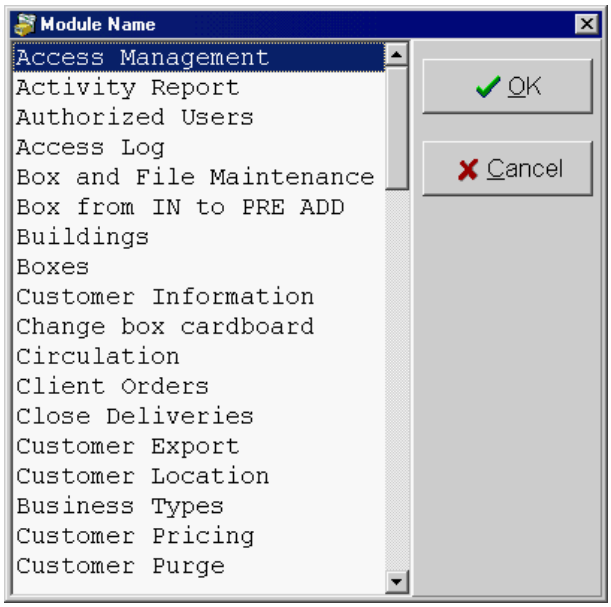
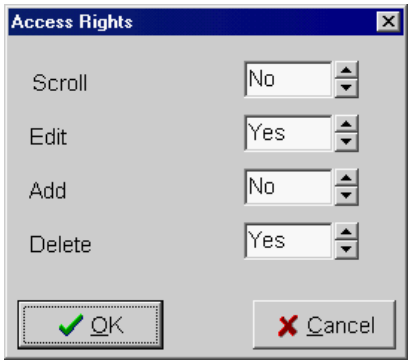


Select a module and press **OK**. A window is displayed and allows to specify the access rights to the module.



Click on the choice button to the right of each field, set to "Yes" the desired fields and press **OK**. The module and its access rights will appear in the window opened in **5**.

- To remove the access to a module select it and click on the **Delete** button. Click on the **Yes** button of the dialog box that is displayed to confirm the operation.

7 Click on the **Accept** button of the module when finished.

6.2.3.5 Copying and adding an employee group

To create an employee group with similar access rights to an existing group, use the *copy and add* function.

1. Open the **Management**->**Employee** module.
2. Navigate to the employee group to copy from.
3. Click on **Edit**->**Copy and Add**.
4. Enter the name of the new group, and modifiy the access rights 178 if desired.
5. To complete the operation click on the **Accept** button.

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6.2.3.6 Deleting an employee group

1. Click on **Management**->**Employee Group** from the *Main window*.
2. Search the employee group to be deleted.
3. When the desired employee group is on the screen click on **Edit**->**Delete**. The employee group is removed from the system.

Note : The system will prevent you from deleting a group if it is used.

6.2.3.7 Viewing or printing the list of all employee groups

1 Click on **Management**->**Employee Group** from the *Main window*.
2 Click on **File**->**View report**|**Print report**.
3 The list of all the employee groups for the record center is automatically displayed or printed by the system.

6.2.3.8 Viewing the list of employees belonging to a group

To view the list of employees belonging to an employee group:
1. Open the **Managment->Employee Group** module.
2. Navigate to the desired group
3. From the menu, select **View->View employees**. A report appears.

6.2.4 Delivery Vehicle

6.2.4.1 Overview (Delivery Vehicle)

The *Management->Delivery Vehicle* module enables you to create a list of delivery vehicles for use on delivery routes 543.

Available reports
- list of delivery vehicles

Fields
- **Description:** Describe the vehicle
- **Transit Location:** Select a transit location 186

Tasks
- Adding a delivery vehicle 182
- Removing a delivery vehicle from the list 182
- Viewing or printing the list of all the delivery vehicles 182

Distinctive menu options:
- None

Module window:

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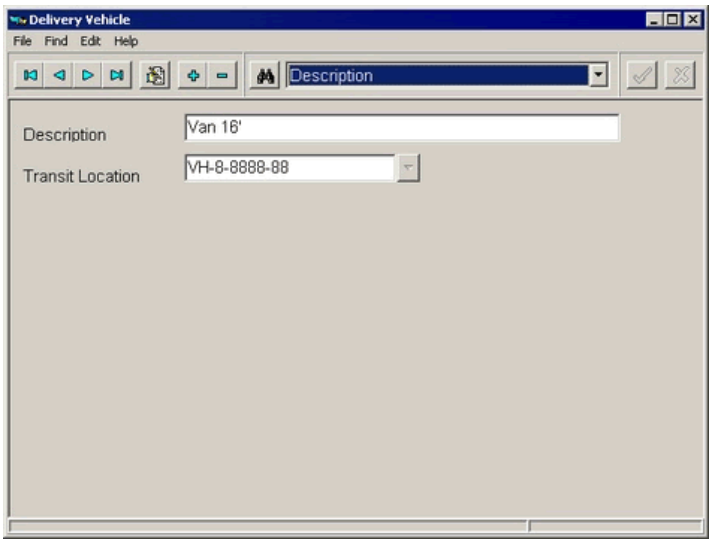


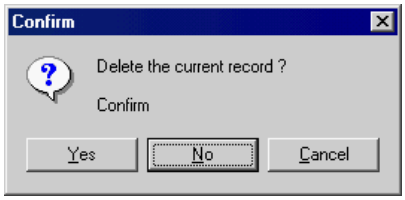
6.2.4.2 Adding a delivery vehicle

1. Click on **Management**->**Delivery Vehicle** from the *Main window*.
2. Click on **Edit**->**Add**.
3. Enter a description for the new vehicle.
4. Assign a transit location to the vehicle.
5. Click on the **Accept** button.

6.2.4.3 Removing a delivery vehicle from the list

When a vehicle is not used anymore for deliveries by the record center it can be judicious to proceed to its removal from the list of vehicles that are still in activity.

1. Click on **Management**->**Delivery Vehicle** from the *Main window*.
2. Find the vehicle to be removed.
3. Keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



4. Click on the **Yes** button in order to confirm the operation. From now on, this vehicle will not appear in the current module or on the list associated with the *Vehicle* field from the *Delivery Route* module.

6.2.4.4 Viewing or printing the list of all the delivery vehicles

1. Click on **Management**->**Delivery Vehicle** from the *Main window*.
2. Click on **File**->**View report**|**Print report**.
3. The list of all the delivery vehicles is automatically displayed or printed by the system.

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6.2.5 Business Type

6.2.5.1 Overview (Business Type)

This module creates a list of business types for classifying customers 228 in the *Customer->Customer Information* 223 module. This information can be used in reports 364 for analysis, and can also be used in searching for customers when generating mailing lists or applying rate increases.

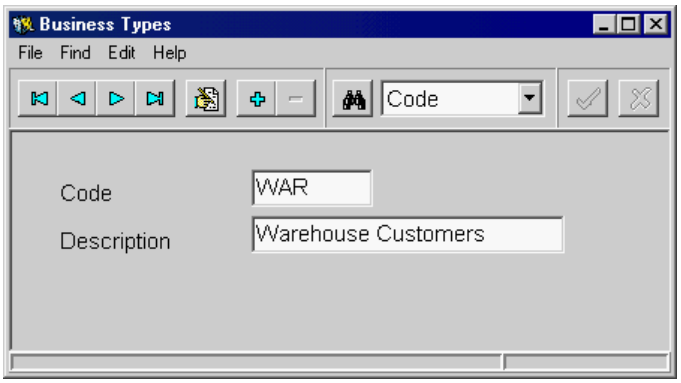
Available reports
- list of business types

Fields
- **Code:** 3 alphanumeric characters identifying the business type
- **Description:** A longer description of the business type, up to 40 characters.

Tasks
- Adding or editing a business type 183
- Viewing or printing the list of all business types 184

Distinctive menu options:
- (None)

Module window:



6.2.5.2 Adding or editing a business type

1. Click on **Management->Business Type** from the *Main window*.
2. Click on **Edit->Add|Edit**, respectively to add or edit a business type.
3. Move to the *Code* field and enter or modify the code that will be used everywhere in the system to identify the business type.
4. Move to the *Description* field and enter or modify the description that will give the summary description of the business type.
5. Click on the **Accept** button.

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6.2.5.3 Viewing or printing the list of all business types

1. Click on **Management**->**Business Type** from the *Main window*.
2. Click on **File**->**View Report|Print Report**.
3. The list of all the business types is automatically displayed or printed from the default printer.

6.2.6 Holidays

6.2.6.1 Overview (Holidays)

Entering dates in this module will prevent EDC RC from allowing deliveries to be scheduled when the record center is closed dues to holidays. This is especially necessary if your record center offers tape rotation[357] service. Holidays should be entered at least as far into the future as rotation schedules are entered. If a customer has their own specific holidays, these should be entered in the *Customer->Customer Holidays*[305] module.

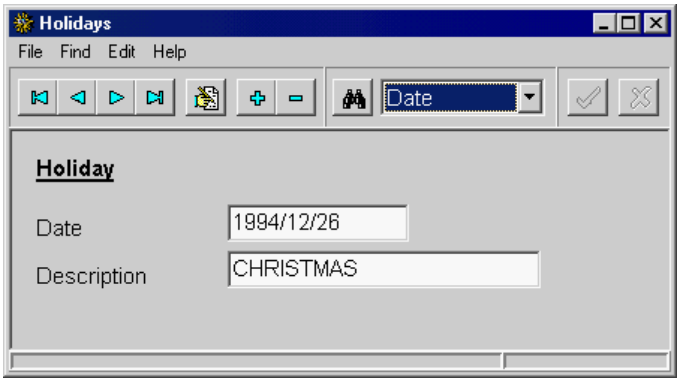
Available reports
- list of holidays

Fields[184] **(see the next section)**

Tasks
- Adding or editing a holiday[185]
- Deleting a holiday[185]
- Viewing or printing the list of all holidays[185]

Distinctive menu options:
- (None)

Module window:



6.2.6.2 Fields (Holidays)

Holiday
Date
Field with predefined date mask that allows to specify the date when the record center will be closed. The date will respect the *Date Mask* specified in the *System Information* module.

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Description
This field allows to clearly identify the holiday. This description generally corresponds to the usual denomination of the day, such as "Christmas" or "New Year's".

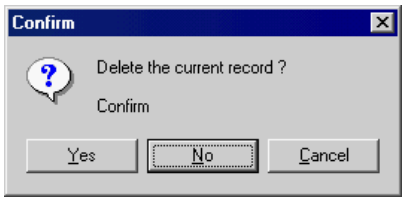
6.2.6.3 Adding or editing a holiday

1. Click on **Management**->**Holiday** from the *Main window*.
2. Click on **Edit**->**Add|Edit**.
3. Move to the *Date* field and enter or modify the date when the record center will be closed.
4. Move to the *Description* field and enter or modify the description of the holiday.
5. Click on the **Accept** button when finished.

Note : The system allows to enter only one holiday for the same date, even if descriptions are different.

6.2.6.4 Deleting a holiday

1. Click on **Management**->**Holiday** from the *Main window*.
2. Find the holiday to be deleted.
3. Keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



4. Click on the **Yes** button to confirm the deletion.

Note : As soon as a holiday is deleted, it automatically becomes a potential delivery date.

6.2.6.5 Viewing or printing the list of all holidays

1. Click on **Management**->**Holiday** from the *Main window*.
2. Click on **File**->**View report|Print report**.
3. The list of all the holidays is automatically displayed or printed from the default printer.

6.2.7 Building

6.2.7.1 Overview (Building)

A record center may have multiple storage buildings in different cities, requiring separate picking lists, rush order paging systems, and transit locations. The *Management->Building* module is used to manage many of these building-specific parameters.

Available reports
- list of buildings

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Fields186 **(see the next section)**

Tasks

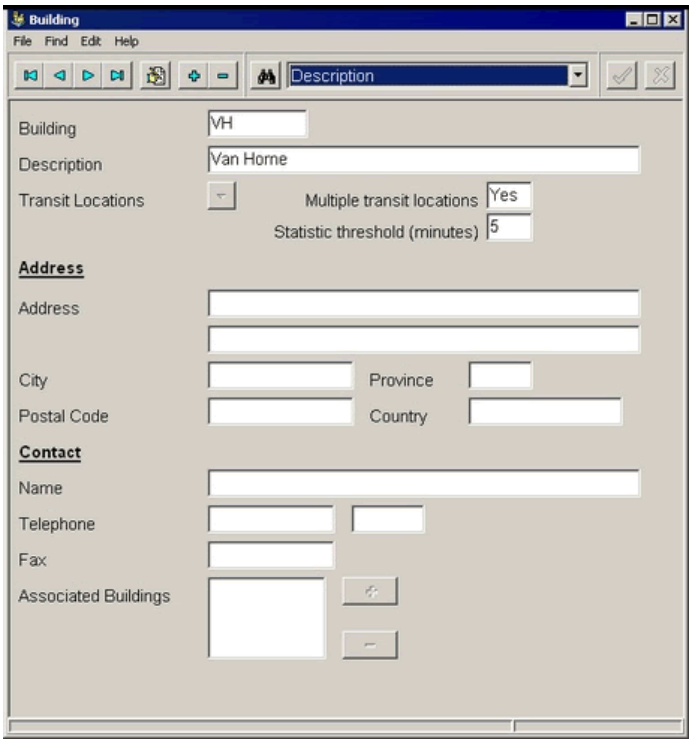
- Adding or editing a building188
- Deleting a building188
- Printing or exporting transit location labels189
- Viewing or printing the list of all buildings190

Distinctive menu options:

File menu

- Print transit location labels (Laser | Thermal | Export to file)189

Module window:



6.2.7.2 Fields (Building)

Building
Enter a unique code for each building of the record center. This is typically one but sometimes two characters long. EDC will correct you if it does not match the location mask established in the system information module.

Description
Enter an optional brief description for each building. Possible suggestions include the city or street where the building is located.

Transit Locations
Click this drop-down box to create or edit a list of transit locations. Transit locations are temporary locations where items may rest before going to a permanent location. Examples include delivery vehicles, receiving and shipping areas, and bins used for collecting files for re-filing in batches.

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Multiple Transit Locations
If this this field is set to "No", the default transit location (the first one when sorted alphabetically) will be used whenever a transit location is required. Otherwise, you will be prompted to select a transit location from the list.

Statistic threshold
This numeric field determines the number of minutes the PDT will stay open for statistics to be relevant. Ex: if the field is set to five and the PDT is not used for more than five minutes, the scanning before and the scanning after are considered as separate actions instead of a continuous action. Later, the statistics will be calculated according to both scanning periods.

One would set up a 10 minutes threshold if one has many spaces available and the refiling or the move can be done quickly. If, instead, the warehouse is very big and the available spaces are sparse, then it might be more logical to put it to 20 or 30 minutes.

Alternate location label on pick list
When "Yes", the alternate location label will be included on the picking list. There is a related option to display alternate location labels on the PDT, found on the 4-Utilities menu.

Tax A
Numeric field specifying a percentage value for the tax A for customers that are billed out of this building.

Note : The name of the taxes (A and B) can be modified in the *Dictionary* module.

Tax B
Numeric field specifying a percentage value for the tax B, for customers that are billed out of this building.

Address

Address/City/Postal Code/Province/Country

These fields allow to enter the main address of the building.

Contact
Name/Telephone/Fax

These fields allow to enter the name of the person responsible for each building and its contact coordinates. This person is usually the warehouse manager.

Associated Buildings
This field is used to specify if other buildings are associated with the current building. The settings of this field will have an impact on delivery creation for regular orders and on picking lists. The system will automatically create deliveries and picking lists for the current building and its associated buildings. This can be useful when implanting a new building that is not yet fully staffed.

Here is a comparative chart of the main differences between separate and associated buildings:

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	ASSOCIATED BUILDINGS		SEPARATE BUILDINGS	
	Same building	Other building	Same building	Other building
INVENTORY				
Edit box information	yes	yes	yes	yes
Edit box location	yes	no	yes	no
PICK AND RUN				
Download pick and run	yes	no	yes	no
CIRCULATION				
Creating an order	yes	yes	yes	yes
Picking items	yes	yes	yes	no
Creating a delivery	yes	yes	yes	no
Closing a delivery	yes	no	yes	no
Downloading/uploading truck validation	yes	yes	yes	yes
Downloading deliveries	yes	yes	yes	yes
Returning deliveries	yes	yes	yes	yes
* When buildings are associated, the transit locations are not shared				

6.2.7.3 Adding or editing a building

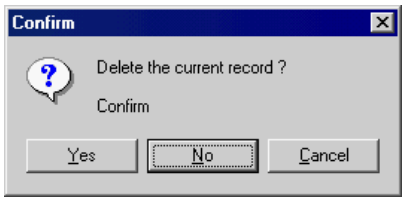
1. Open the **Management->Building** module.
2. From the menu, select **Edit->Add|Edit**.
3. Enter or modify information in the appropriate fields 186.
4. Click on the **Accept** button when finished.

Note : Each building must have at least one transit location. Click the **Transit Location** drop-down field to view, add or delete these.

6.2.7.4 Deleting a building

The deletion of a building can be necessary, especially when the record center decides to centralize its operations in one area or when an old building is sold. The record center has to insure that no documents will be checked as being stored at a building which is not operational anymore or which doesn't belong to the record center.

1 Click on **Management**->**Building** from the *Main window*.
2 Search the building to be deleted.
3 When the desired building is displayed on the screen click on **Edit**->**Delete**. A dialog box appears.



4 Click on the **Yes** button to confirm the deletion. The system will proceed automatically.

Note : In order to be deleted from the system, a building must not have any defined location or must not be granted to a customer. In that situation, the *Customer Information* and the *Location* modules have to be opened and modified consequently. Locations must also be

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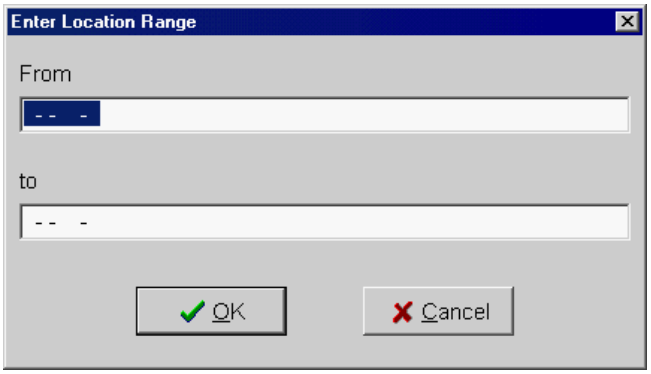
emptied before being able to delete them.

6.2.7.5 Printing or exporting transit location labels

Printing transit location labels

1 Click on **Management**->**Building** from the *Main window*.
2 Click on **File**->**Print transit location labels**->**Laser**|**Thermal**. A window appears.



3 Enter an interval of locations and press **OK**.
4 A window appears asking which label the first label should be. *Example :* if you only want to start printing from the third space on your page you would enter the number three in the field.
5 Press **OK**. The system automatically prints the labels on the default laser printer or on the thermal printer attached to the workstation.

Note : The system does not print all the location included in the interval entered in **2**. It only prints the locations defined as transit locations.

Exporting transit location labels

A record center may decide to have a third party print its transit location labels. With this operation, the record center can simply send the transit location numbers to the third party by email with a text file attached.

1 Click on **Management**->**Building** from the *Main window*.
2 Click on **File**->**Print transit location labels**->**Export to file**. A window appears, different for each workstation, and asks to enter a file name and directory.
3 Enter a name and select a directory for the text file then click on the **Save** button (or **Enter**, etc). A window opens.

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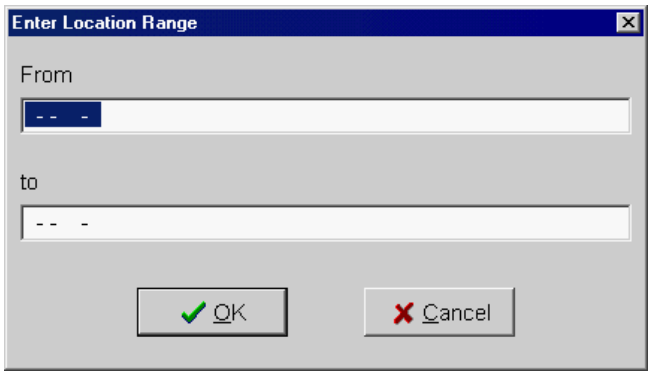

4 Enter an interval of locations and press **OK**. The transit locations included in the interval are automatically exported to the text file.

6.2.7.6 Viewing or printing the list of all buildings

1. Click on **Management->Building** from the *Main window*.
2. Click on **File->View report|Print report**.
3. The list of all the buildings will be automatically displayed or printed.

6.2.8 Dictionary

6.2.8.1 Overview (Dictionary)

The *Dictionary* module enables you to manage the terminology used by **EDC**, in two languages. The main record center dictionary applies to the record center. Terms can be overridden in the customer dictionary. This affects the ActiveWeb interface but not the record center one.

Available reports
- Report - terms, indexed by number or by the current language.

Fields 191 (see the next section)

Tasks
- Editing the software's terminology 192
- Viewing or printing the software's terminology 193

Distinctive menu options:

File menu
- Open main dictionary 191
- Open customer dictionary 191
- Open dictionary 191

Edit menu
- Search and replace 192
- Change bilingual terms to English only 193
- Change bilingual terms to French only 193

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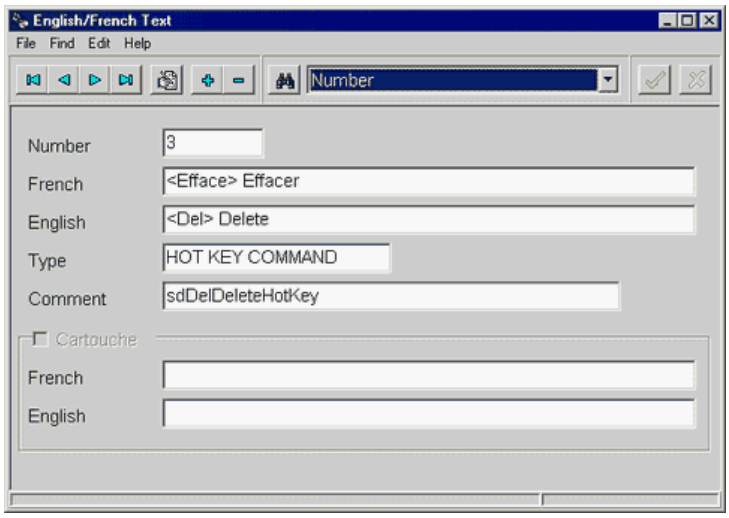
Module window



6.2.8.2 Fields (Dictionary)

Number
Unique read-only number identifying the string.

French | English
Text used when the language of the system is set to French or English respectively

Type
Category of a string, generally related to how it is used and where it appears within EDC.

Comment
Additional information about how a string is used

Tape
If the the text to be used is different for boxes versus tapes, this checkbox should be selected. The text entered below will be used for tapes, while the text in the previous French and English fields will be used for boxes.

French | English (Tape)
Text used when the language of the system is set to French or English respectively, on the web for tape-only customers

6.2.8.3 Select dictionary to edit

The main dictionary defines all terms used in the EDC software, while the customer dictionary override these terms for a customer on the ActiveWeb interface. It is also possible to open and edit dictionaries that are not presently in use at your record center. (Several foreign-language dictionary combinations are available.)

By default, the module opens to the main dictionary that is in use.

To open a customer dictionary:
1. In the **Management->Dictionary** module, select **File->Open customer dictionary**.

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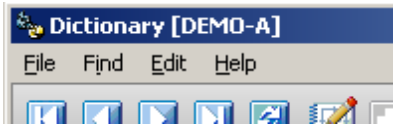
2. Enter the customer key 225 and click **Ok** or press **Ctrl-Enter**.

Notice in the title bar, that the key of the selected customer is now displayed (eg. DEMO-A)



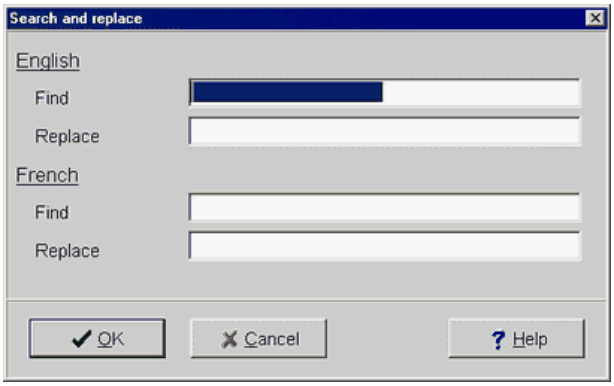
To open the main dictionary after opening a customer dictionary:
1. In the **Management->Dictionary** module, select **File->Open main dictionary**. The main dictionary will be opened, and the title bar will display the record center name.

To open a dictionary that is not in use:
1. In the **Management->Dictionary** module, select **File->Open dictionary**.
2. Browse to the desired dictionary, and click the **Open** button.

This feature is not widely used. It allows you to explore and edit an external dictionary, for example one using different language combinations. Changes made in this dictionary will not be reflected in EDC unless the dictionary is installed. Please contact Support@Docudatasoft.com for assistance if changing your dictionary seems necessary.

6.2.8.4 Editing the software's terminology

1. Click on **Management->Dictionary** from the *Main window*.
2. Click on **Edit->Search and replace**. A window opens.



3. Enter the expression to be searched or replaced in both languages or just in one language, and press **OK**. A window appears for every term of the software where the searched expression is present. This is a procedure to provide changes everywhere in the software where the expression is used.
4. For each window that appears, press **OK** to approve modifications or on the **Cancel** button to keep the original term and go to the next term.

Alternatively, if you know the number of the string that you wish to edit:
1. Press **Ctrl-K** and set the search index to Number.
2. Press **Ctrl-F** to enter the string number to search for.
3. Press **Ctrl-Enter** to go to the string.
4. Press **Ctrl-E** to edit the string. Make any modifications.
5. Press **Ctrl-Enter** to accept changes.

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Note: For changes to take effect, the dictionary must be refreshed. You can accomplish this by exiting and restarting EDC RC, or by switching the language to French and then back to English (from any module window, **Help->Change Language**, select French, **Aide->Langue**, select English).

6.2.8.5 Viewing or printing a list of all the terms used in the system

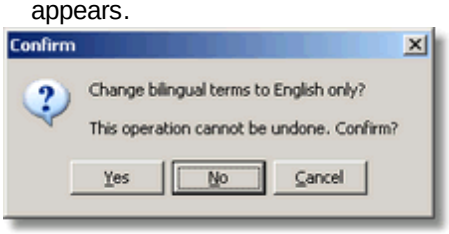
1. Click on **Management->Dictionary** from the *Main window*.
2. Click on **File->View report**. A window appears.
3. Click **YES** to sort the report by string number, or **NO** to sort by Description
4. The report is automatically displayed on the screen.

6.2.8.6 Change bilingual terms to English only (or French only)

Certain strings in the default dictionary contain terms in two different languages, to communicate with users who have not yet identified their language preferences by logging in.

Record centers with customers that communicate in a single language may wish to eliminate the use of the second language in the interface as follows:

1. Open the **Management->Dictionary** module
2. From the menu, select **Edit-> Change bilingual terms to English | French only**. A dialog box appears.



3. To confirm the change, click **Yes**.

Note: This will not affect strings that have previously been altered by the record center in the dictionary.

6.2.9 Access Log

6.2.9.1 Overview (Access Log)

The access log tracks who is accessing the system by EDC RC, ActiveFile, and ActiveWeb.

Sessions can be terminated in this module, and also using the Access Management program, DcLock32.exe, which is in the bin directory.

Available reports

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- Access log for a specific period, for one all customers 195

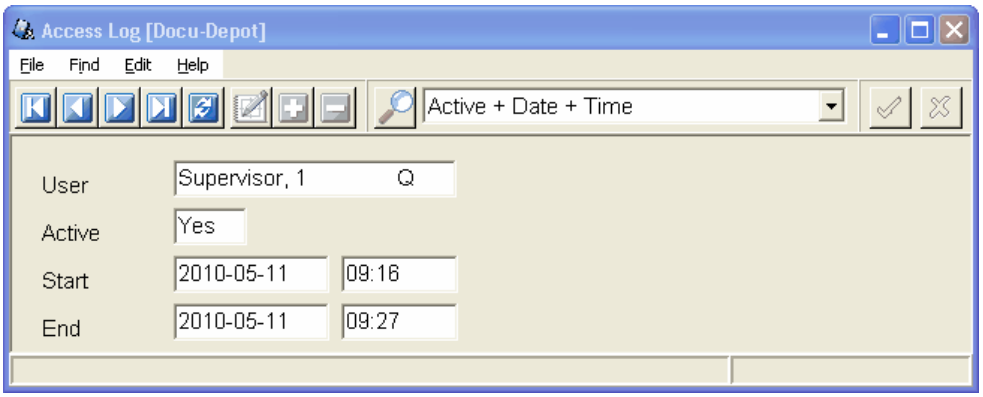
Fields 194 **(see the next section)**

Tasks
- Terminating an active session 194
- Viewing or printing the access log 195

Distinctive menu options:

Edit menu
- Terminate session 194

Module window:



6.2.9.2 Fields (Access Log)

User
Indicates the user's name.

Active
"Yes"indicates that the user is currently using ***EDC***.

Start
Start date and time of the selected session.

End
End date and time of the selected session.
For an active session, this field indicates the current date and time.

6.2.9.3 Terminating an active session

1. Open the **Management->Access Log** module
2. Navigate to the desired session.
3. From the menu select **Edit->Terminate session**.
4. The system prompts, "Terminate the session of the user? Confirm?". Click **Yes**.

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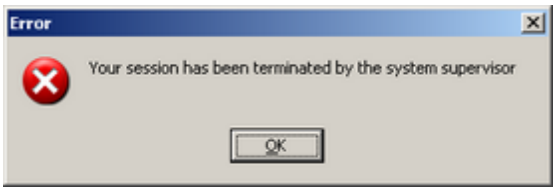
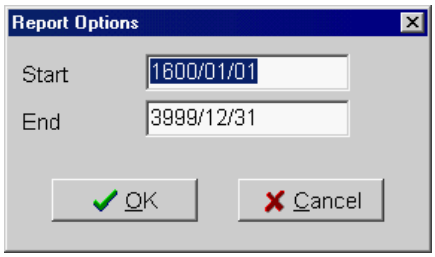


5. If the user was active, they will see the above message, and their session will close.

Note that active web sessions can be managed from the menu option on the main window[168].

6.2.9.4 Viewing or printing the access log

1 Click on **Management->Access Log** from the *Main window*.
2 Click on **File->View Report|Print Report**. A dialog box appears.



3 Enter an interval of dates for which the report has to be produced and press **OK**. The report is automatically displayed or printed.

6.2.10 System Information

6.2.10.1 Overview (System Information Module)

The *Management->System Information* module contains parameters to tailor the behaviour of *EDC RC* to the needs of your specific record center.

Available reports
- Partial summary of system information parameters.[207]

Fields[197] (see the next section)

Tasks
- Editing system information[207]
- Creating the exclusion list for deliveries[210]
- Viewing or printing system information[207]
- Adding or deleting route templates[211]
- Creating noise words[213]

Distinctive menu options:

File menu
- Configure PDT[206]

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- Purge error log 207
- Deploy ActiveWeb (See technical manual)
- Deploy ActiveWeb portal (See technical manual)

Edit menu

- Delivery notes 206
- Delivery exclusion list 210
- Route templates 211
- Global invoice note 211
- Client software trial email 212
- Noise words 213
- Label templates 213
- Document separator pages 214
- service record centers 94
- Billing record center passwords 98
- Unlock operation 216
- Image directory 216
- Documents directory 216

Report menu

- Record center | Customer -> Box | File report fields 217 Changing list layouts and setting the default report

Module window:

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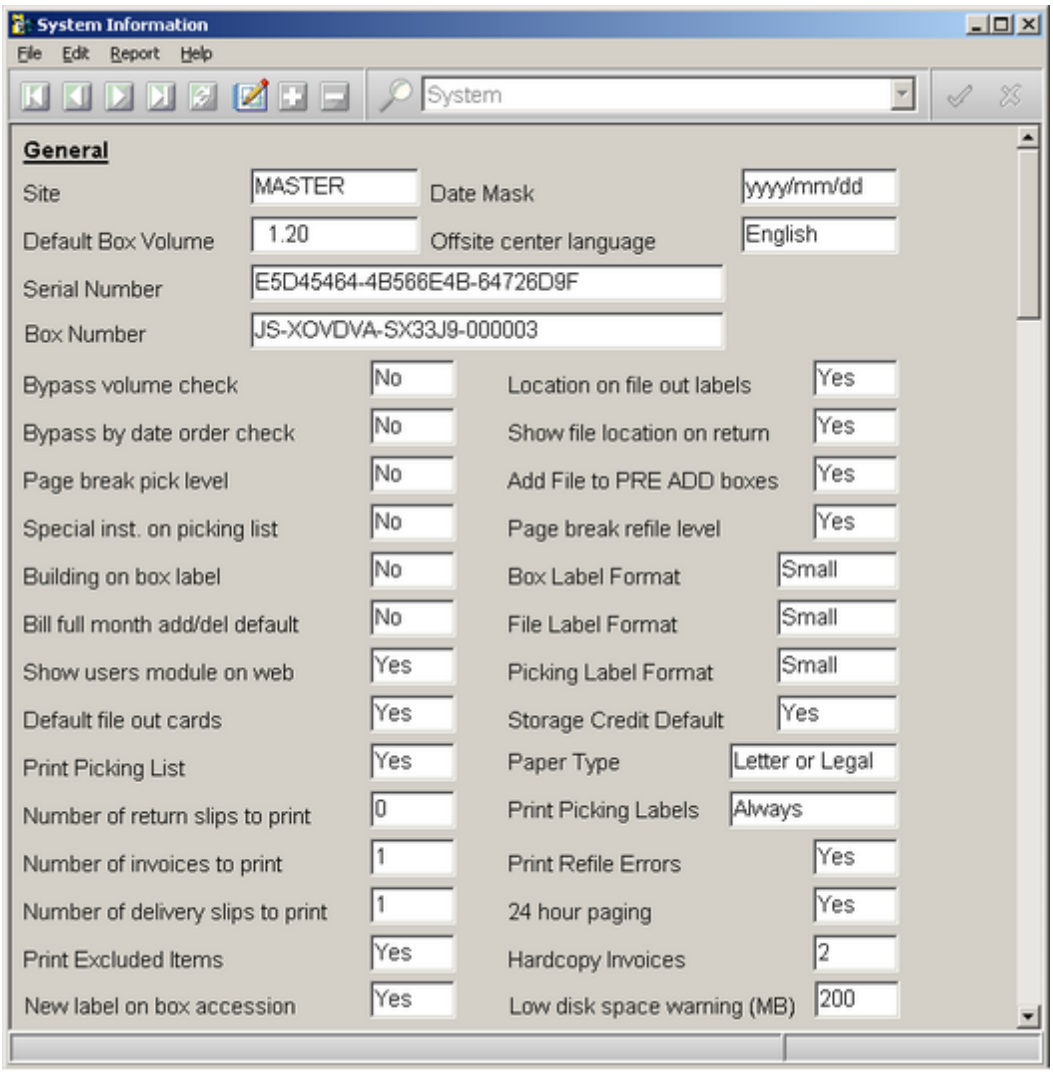

6.2.10.2 Fields (System Information Module)

General

Site
This is the data site. This field is set for "MASTER" at the off-site record center and "CLIENT" at the in-house record center for customers who use ***EDC***.

Date Mask
Mask of the date format used throughout the system.

Default Box Volume
Numeric field used to assign a default box volume to boxes in the PRE ADD[727] state. If customers use box types (which is standard practice), this value should match the volume assigned to the most common box type, in the *Box type* module. The box type of each box could be modified manually in the *Box* module.

Offsite center language
Choice field containing the two languages defined in the *Dictionary* module.
This field indicates the display language of the ***EDC*** software at the off-site record center.

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Serial Number
This number helps the technical support people by providing some important information about the software. The serial number must be modified if the amount of users or the level of functions is changed.

Box Number
This number must be modified if the maximum number of boxes that can be tracked by EDC is altered, by contacting DocuData.

Bypass volume check
Choice field containing "Yes" or "No".
When this field is set to "No", the system checks if the volume (associated to the box type) of a box corresponds to the location volume.

Location on file out labels
Choice field containing "Yes" or "No".
When this field is set to "Yes", the portion of labels printed and affixed on files when they are retrieved from inventory will indicate the location of the box they belong to. This will make the return of files more efficient.

Bypass by date order check
Choice field containing "Yes" or "No".
When this field is set to "No", the system has to take into account the picking times when placing orders by date.
For example, when the field *Afternoon picking time* is set to "16h05" and an order by date for the next morning is placed at 16h06, the system will not accept the order. It will consider that the order has to be delivered the next afternoon or the day after, according to deliveries that can be either on a half-day or a daily basis (see the *Delivery Cycle* field for more details).

Show file location on return
Choice field that can contain"Yes" or "No".
If this field is set to "Yes", an information box will appear when returning a file in the *Return Delivery* module and will indicate the file location.

Page break pick level
Choice field containing "Yes" or "No".
When setting this field to "Yes", it allows to separate the picking lists (created in the *Pick List* module) in several pages when they contain documents stored on different levels (or floors, or sections, etc) at the record center. For example, if a record center has several floors, the documents to be picked on the first floor will appear on one page, the documents to be picked on the 3rd floor will appear on another page, etc.

Add file to PRE ADD boxes
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system will automatically add a PRE ADD file when generating PRE ADD boxes. This setting is usually set to "Yes" when clients want to use imaging for boxes that don't necessarily have files in them. This is done because the software does not allow imaging without a file.

Special inst. on picking list
Choice field containing "Yes" or "No".
When this field is set to "Yes", a new column is added to paper picking list reports. This column is

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called Note and if the order of the item has special instructions, the column will indicate "*001", for example, where "001" is a footnote to identify the special instructions which will be printed at the end of the picking list.

Page break refile level
Choice field containing "Yes" or "No".
When setting this field to "Yes", it allows to separate the refile lists (created in the *Return Delivery* module) in several pages when they contain documents stored on different levels (or floors, or sections, etc) at the record center. For example, if a record center has several floors, the documents to be refiled on the first floor will appear on one page, the documents to be refiled on the 3rd floor will appear on another page, etc.

Building on box label
Choice field containing "Yes" or "No".
When this field is set to "Yes", labels printed and affixed on boxes will indicate the building they belong to. If the box is moved to another building, it is the staff's responsibility to print a new label.

Box Label Format (Applies to older thermal printers)
Choice field containing "Regular", "Small" or "Extra small".
This field allows to select the format that will be used by default when printing box labels. These labels essentially contain the box number and bar code, its description and the code of the customer to which the box belongs.

Size of formats
- Very Small : ½" x 3"
- Small : 1" x 3"½
- Perforated : 6" x 3"½

Bill full month add / del default
Choice field containing "Yes" or "No".
When this field is set to "Yes", the rent for new boxes is charged for the entire month.
For example, if a box is added on the last day of the month, rent is charged for the entire month. If a customer is billed every three months, some new boxes may be billed for more than one month, depending on the month of the billing period they were entered.

File Label Format (Applies to older thermal printers)
Choice field containing "Regular" or "Small".
This field allows to select the format that will be used by default when printing file labels. These labels essentially contain the file bar code and number (if such is the case), its description, the box number where the file is located and the code of the customer to which the file belongs.

Size of formats
- Small : 1" x 3"½
- Regular : 2" x 4"

Show user module on Web
Choice field containing "Yes" or "No".
When this field is set to "No", the *User* module will not be available on ***ActiveWeb***. This field should be set to "no" all the time if the record center wants to strictly control the access rights to orders for its customers.

Picking Label Format (Applies to older thermal printers)
Choice field that can contain "Small" or "Perforated".

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This field is efficient only when the field *Print Picking Labels* is set to "Yes" in the current module. This field allows to select the format that will be used by default when printing picking labels.

Size of formats
- Small : 1" x 3"½
- Perforated : 3"½ x 6 " (2 parts that can be separated/perforations in the middle).

Note: Picking labels apply to all labels printed at picking time, ie:

Auto inventoried file label, File out label (same label)
File out card label
Box address label
Container address label (not done yet)

Default file out cards
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the option to print file out cards is automatically activated for any new customer added in the system (see the field *File out cards* 225 in the *Customer Information* module).

Storage Credit Default
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be credited the next month for the cancellation of space usage when deleting, transferring and destroying boxes. This will only work if the "Charge rent" field is set to *Forward* in the Customer information 225 module

Paper Type
Choice field that can contain "Letter or Legal" or "A4".
This field allows to choose the paper type for producing reports in the system.

***Number of Return Slips to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of return slips indicated in this field.

Print Picking Labels
Choice field that can contain "Always", "Never" or "PRE ADD Only".
If this field is set to "Always" (or "Never"), the system automatically prints (or does not print at all) the labels for files when creating a picking list. If this field is set to "PRE ADD Only", the system only prints labels for the items in PRE ADD.

***Number of Invoices to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of invoices indicated in this field.

Print Refile Errors
Choice field containing "Yes" or "No".
When this field is set to "Yes", the system automatically prints a report of the refilling errors after a delivery has been returned.

***Number of Delivery Slips to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of delivery slips indicated in this field.

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24 hour paging
Choice field containing "Yes" or "No".
When this field is set to "Yes", the paging system for orders by delay (the order monitor) is also activated for orders whose delivery type is in 24 hours mode. This means that the order monitor will send out emails or page the people in charge (defined in the Pager options 580) for deliveries that have the delivery type *Ship mode* field set to 24 hour.

Print Excluded Items
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system automatically prints the excluded items with delivery creation.

Hardcopy Invoice
The number of paper invoices to print for customers that have the paper invoice option set to *False*.

New label on box accession
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system' automatically prints a thermal label when a PRE-ADD box is initially brought into the record center on a return delivery. This is typically set to "Yes" if customers create boxes and print laser labels on ActiveWeb, and to "No" if the record center always issues pre-printed labels of new box accession.

Low disk space warning (MB)
Numeric field that can range from 0 to 99999.
If the available space remaining on the disk hosting the RC database drops below the specified number of megabytes, a warning message appears when users logon.

Box Chg. Delivery Type
Choice field listing all defined delivery types. The selected delivery type will be used by the system in invoicing for the service of changing the cardboard of a box (either in the box module 321 or during the return of a delivery 549); a single order is created with this delivery type, to bill this change to the customer. The order will be created for all boxes scanned per customer.

Since billing is based on deliveries, a free delivery type needs to be created, as well as a special price code. Here are the suggested settings for both the price code and delivery type :

Price code

Code : BCD
Description : Box Change Delivery
Units : Delivery
Price : 00.00
Group : Courier
Courier (check box) : Checked

Delivery Type

Description : Box Change Delivery
Price Code : BCD
Ship mode : Regular
Delivery within : 00:00
Courier : Record Center
Ordering: 10

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Note: See also the Min.Touches Box Chg.Charge 231 field in the *Customer Information* module for additional information.

Scheduled order delivery type
Drop-down field associated to a list defined in the Delivery Type 621 module.
This is used for orders created with the Rotation Schedule module, and requires a delivery type that has ship mode "by date", with record center courier. It is used for deliveries created by the rotation schedule module.

The exact price codes that you use will depend on how you bill for shredding service, and whether you want these orders to become grouped with regular orders for the same delivery cycle and address.

Withdrawal list delivery type
Drop-down field associated to a list defined in the Delivery Type 621 module.
This is used for deliveries created to bill for disposal, transfer, and deletion list charges. Ship mode for this delivery type should be *Regular*, and Courier is generally *External*. Ensure that the delivery type has a No Charge price code for delivery handling, and no trip charge.

***Replication**
DocuData RPC Server
IP address of the ***DocuData*** server used when the system needs to receive information as well as send it to other ***EDC*** related systems (it becomes useful when generating web licenses, or communicating with a service record center. eg. services.docudatasoft.com)

Port
Represents the TCP/IP port for access to the ***DocuData*** server. This is typically 443 if SSL security is used, 11007 or 80 otherwise, depending on firewall settings. See the technical manual for more details.

Client installation folder
Directory where the customer data will automatically be exported, when using the *ClientInstaller.exe* application.

RPC server at RC
IP address of the record center's RPC server. This is were the replication and order requests will be sent to. Also specify the **port** number, and whether **SSL encryption** is used. This is frequently encrypted, since communication occurs over the internet.

Internal LAN
This internal address is used when viewing the replication log 498 in the *Box and File Maintenance* module. The software will verify when the replication was active at this specific address. Also specify the **port** number, and whether **SSL encryption** is used.

Web RPC server
The IP address of the computer where the RPC server supporting the web is running. Also specify the **port** number, and whether **SSL encryption** is used. This information is required by EDC to allow you to monitor and manage active web sessions.

Locations
Location Mask
This field defines the format of all locations used in the record center, which may contain up to 20

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characters.(See the definition of mask criteria 727 in the glossary).

It is very important that the location mask be carefully thought out to accurately reflect the physical storage of the record center before locations have been created or boxes added. Once locations have been created, the mask can no longer be modified.

Floor Length
This field allows to indicate the floor length (or section, zone, etc) in the location mask.
For example, when this field indicates "2" and the field *Floor Position* indicates "4", "12" represents the floor in the mask "BB-12-8888-8", because they are the two characters starting at the 4th position ("BB-" are considered as 3 characters).

Floor Position
This field allows to specify the position of the floor (or section, zone, etc) in the location mask.
For example, when the current field indicates "4", the floor number starts with "9" in the location mask "AA-9-8888-8", because it is the 4th number in the mask ("AA-" are considered as 3 characters).

Building Length
This field determines the length of the building code in the location mask. This code is always displayed at the beginning of the location.
For example, when the current field is set to "2 the *Building* field in the *Building* module has to be composed of two characters. Then in the location "CC-9-3333-3", the building is identified by the first two characters as "CC".

Pick up

Morning picking time
This field allows to indicate a deadline for the morning picking and only applies when the *Delivery Cycle* field is set to "Twice a day". Beyond this time, all the regular orders placed in the system will be delivered the next morning.

Afternoon picking time
This field specifies the cutoff for order entry for the afternoon picking.
It is also the value used if the delivery cycle is "Once a day".

Delivery Cycle
Choice field containing "Once a day" or "Twice a day".
This field allows to specify the daily frequency of deliveries for regular orders.

Same day
This setting applies to "Once a day" delivery cycles. With this option selected, regular orders entered by the afternoon picking time will be deliverable the same day. Otherwise, they will be deliverable the following day.

Note that this can be overridden by the Once a day option 239 in the customer information module.

Delivery/Opened/Start/End
These fields allow to specify the working days of the record center, including business hours. The values entered for these fields are major factors in the calculation of delivery times.

Paging margin before opening time (in hours)
Choice field containing values "0" to "255".

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In order to notify employees that an urgent delivery is waiting, this field allows to enter the length of time their pagers will ring before the opening time.

Paging margin after closing time (in hours)
Choice field containing values "0" to "255".
In order to notify employees that an urgent delivery is waiting, this field allows to enter the length of time their pagers will ring after the closing time.

Taxes
Tax Calculation
Choice field containing "Not Taxable", "Tax A Only", "Tax B Only", "Tax A plus Tax B" or "Tax B on Tax A".
The value set for this field determines the default calculation of applicable taxes for billing purposes. This calculation can be modified for each customer and each service of the record center, respectively in the *Customer Pricing* 640 and *General Pricing* 632 modules.

GL Codes
In the ***Invoicing*** module, there is an option that allows to export the billing to other accounting softwares. The General Ledger codes must be absolutely entered here, in order to allow any billing system to recognize the data that is exported.

GL Code for Tax A
Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the tax A.

Note: This code has to match the "chart of accounts" if you use Quickbooks as your accounting software.

GL Code for Tax B
Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the tax B.

Note: This code has to match the "chart of accounts" if you use Quickbooks as your accounting software.

Tax A Code, Tax B Code
Alphanumeric field that can contain a maximum of 30 characters.
This field was made to accommodate some requirements for exporting invoices to Quickbooks. In many versions of Quickbooks, entering "AUTOSTAX" in this field will identify this as a tax and permit the software to apply the correct code according to regional settings. This also applies if there is no second tax.

GL Code for Accounts Receivable
Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the accounts receivable.

Tax A Agency, Tax B Agency
Alphanumeric field that can contain a maximum of 40 characters, used to specify the name of the tax agency for tax A, for exporting to Quickbooks. For example, in Canada, Tax A Agency is 'RECEIVER GENERAL' for GST, and Tax B Agency is 'MINISTER OF FINANCE' for PST

Quickbooks Class
Alphanumeric field that can contain a maximum of 40 characters. This optional field can be useful

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for identifying the entries as originating from your records management division, if you are managing the accounts of multiple divisions with the same Quickbooks software. The value in *System Information* can be overridden per customer in the *Customer Information* module.

Print Invoices from Accounting Software
Choice field containing "Yes" or "No".
When this field is set to "Yes", the system will automatically transfer the invoicing information to the accounting software that will print them.

***Imaging**
Image Directory
Location for internal storage of images. This field can be set using the **Edit->Image directory** 216 function. Please contact DocuData support if you wish to change this.

Image Server
IP address of the engine where image server is active.

Port
Represents the TCP/IP port to access the image server.

Documents Directory
Directory for use by the Electronic Document Management level of ActiveWeb, for storing the customers electronic documents. If you have many customers that use this functionality, this folder may occupy a lot of disk space.

***Record Center**
These fields allow to enter the name and the main address of the record center.

***SMTP Address**
This field indicates the address of the output mail server. This is used for rush notifications (see Paging options 580 in the *Procedures* chapter), for emailing images or bills to customers.

Port
Represents the TCP/IP port to access the SMTP server.

SMTP User Name
This field indicates the user name in the output mail server.

SMTP Password
This field indicates the password of the user in the output mail server.

Note : It is essential to set a value for this field, especially when a record center performs imaging on demand or sends bills electronically to customers.

Name, Address, City, Province, Postal code, Country, Telephone, Fax, Internet, Email.
These fields allow to enter the coordinates of the record center.

ActiveWeb URL
This is address of ActiveWeb on the internet. A link to this site is included in e-mail notification that imaging orders have been fulfilled.

Invoice email BCC
Invoices sent by e-mail will also be copied to this address. Record centers typically set up an e-

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mail address specifically for this purpose, in case sent e-mails need to be reviewed.

Invoice email reply to
When invoices are sent by e-mail, replies will be sent to this e-mail address. This includes delivery failure notices and out of office replies.

Billing Address
These fields allow to enter the billing coordinates of the record center.

Invoice Address Position
These fields permit the positioning of the billing address on print invoices, to align with envelope windows.

Internal Transfer List
Maximum Size
This numeric field indicates the maximum of items that an internal transfer list can contain.

Report Options
Box
These choice fields can contain "Yes" or "No" and allow to specify if the reports of boxes will include the boxes in PRE ADD, the boxes' notes, the deleted boxes and the files inside boxes.

File
These choice fields can contain "Yes" or "No" and allow to specify if the reports of files will include the files in PRE ADD, the files' notes and the deleted files.

Alternate bar code lengths
3 to 20
Choice fields that can contain "None", "Box" or "File".
When a record center has decided to use ***EDC***, the original bar codes of all documents (alternate bar codes) are converted in order to be recognized by ***EDC***. The current fields allow to connect different bar code lengths with various items (boxes, files, locations, etc.).
If a field is set to "None", any item whose alternate bar code has the same length will be considered as being a location.
If a field is set to "Box" or "File", any item whose alternate bar code has the same length will be considered as being an inventory item. The system will make the difference between boxes and files according to the operation that it is being performed (box return, file return, etc.).

6.2.10.3 Configuring the PDT for various operations

This option allows to update the PDT configuration before performing any operation with the device.

Normally, only the record center supervisor has access to the *System Information* module and is able to modify the system information (module's fields). In fact, some of these modifications can have an impact on the interpretation of data scanned with the PDT. This is the case for the *Alternate bar code lengths* 197 field. That is why the supervisor should think to reconfigure the PDTs anytime a system information is modified.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **File**->**Configure PDT**. A dialog box appears.

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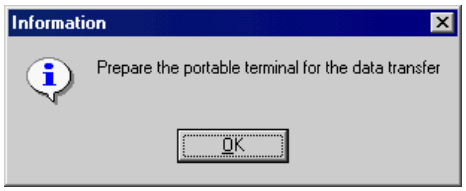

3 As recommended, prepare the PDT to receive the data and press **OK**. As soon as the transfer is complete, the PDT is ready to process any operation (picking, returns, refiling, etc).

6.2.10.4 Purging the error log

Purging the error log is a maintenance operation that can be performed every two or three months (or more), to reduce the amount of information to sort through when an error must be consulted for problem solving. Usually the error log is used by IT personnel to make sure everything is working properly, thus the purge enables them to easily track recurring problems.

1 Click on **Management->System Information** from the *Main Window*.
2 Click on **File->Purge Error Log .** A window appears.
3 Enter a date range for which you want the purge to be performed and press **OK**. All the data contained in the error log within this date range will be deleted from the file. The changes will be noticeable if the error log is consulted (**Main window ->Help ->View Error Log**).

6.2.10.5 Editing system information

Consult the description of the fields in the previous section in order to know which parameters can be configured in this module.

1 Click on **Management->System Information** from the *Main window*.
2 Click on **Edit->Edit**.
3 Enter the desired information in the appropriate fields 197.
4 Click on the **Accept** button when finished.

6.2.10.6 Viewing or printing system information

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. The report is automatically displayed or printed as follows.

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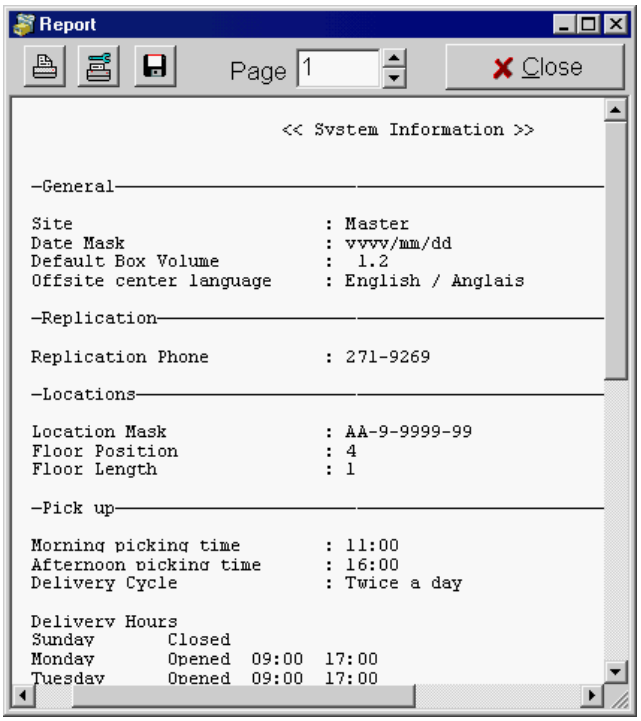
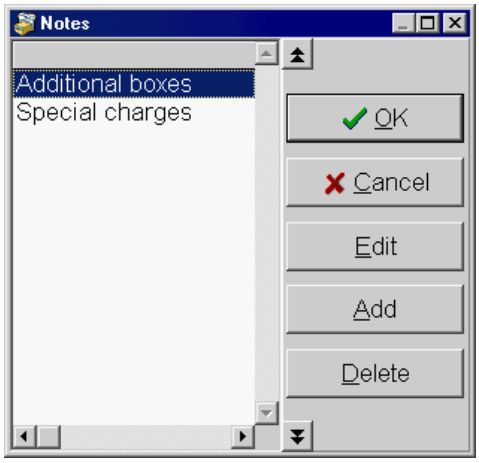


6.2.10.7 Adding, editing or deleting the notes for deliveries

In order to be consistent and to save time, some notes can be predefined and can be added easily on deliveries. These notes will also be used to justify additional or canceled charges on deliveries.

1. Click on **Management**->**System Information** from the *Main window*.
2. Click on **Edit**->**Delivery Notes**. A window opens.



3. Perform one of the following operations :

- To remove a note, select it and click on the **Delete** button. A dialog box appears and asks to confirm the operation. Click on the **Yes** button to proceed to the deletion.

- To modify a note, select it and click on the **Edit** button. A window appears.

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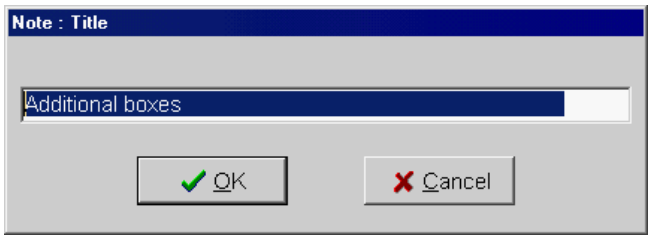
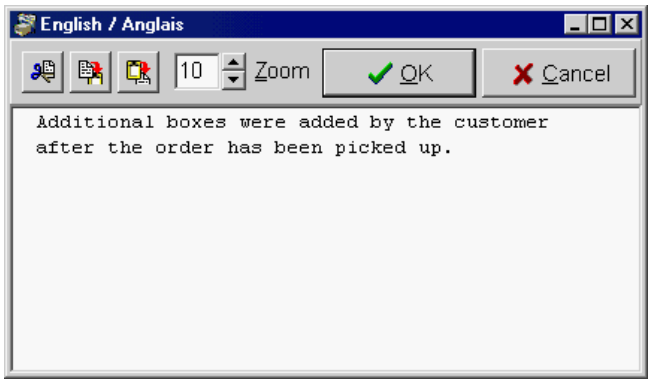


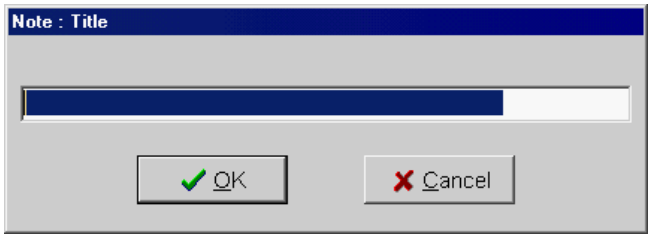
Enter a new title for this note and press **OK**. A new window is displayed on the screen.

Select one language to specify which version of the note has to be modified and press **OK**. A new window appears.



Enter the desired changes in the text and press **OK**.

- To create a new note, click on the **Add** button. A window appears.



Enter a title for the note and press **OK**. A text window opens and allows to enter the note in English. Proceed and press **OK**. Another text window, similar to the previous one, appears and allows to enter the note in French. Proceed and press **OK.**

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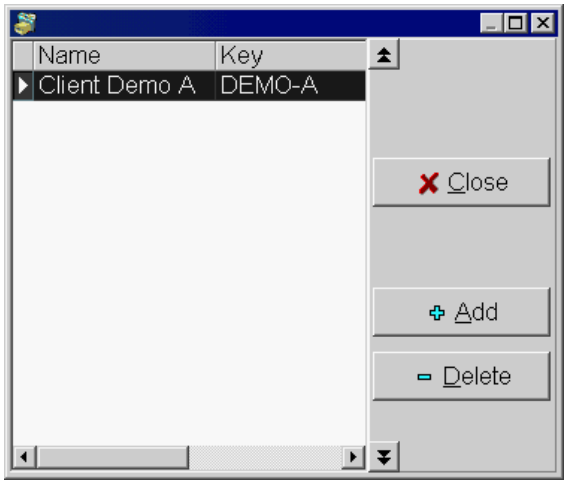
6.2.10.8 Creating the exclusion list for deliveries

Regular orders of documents are generally picked up on a half-day or daily basis, according to the parameters set in the *Customer Information* and *System Information* modules. When regular deliveries are created at a set time, the system compiles all the regular orders for all the customers. For practical reasons, a customer can be excluded from the list of regular deliveries and its own deliveries can be created manually at a specific time.

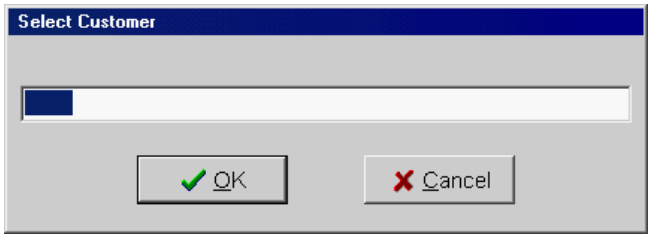
1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Delivery Exclusion List**. A window opens on the screen.



Note : This window contains the list of the customers which are excluded from regular deliveries. This list is empty when no customer has been defined as such.

3 Perform one of the following operations :

- To add a customer to the exclusion list click on the **Add** button. A window appears.



Enter the code of the customer to be added and press **OK**.

- To remove a customer from the exclusion list, select it and click on the **Delete** button. A dialog box appears and asks to confirm the operation. Click on the **Yes** button and the customer will not appear anymore in the exclusion list.

4 Click on the **Close** button when finished.

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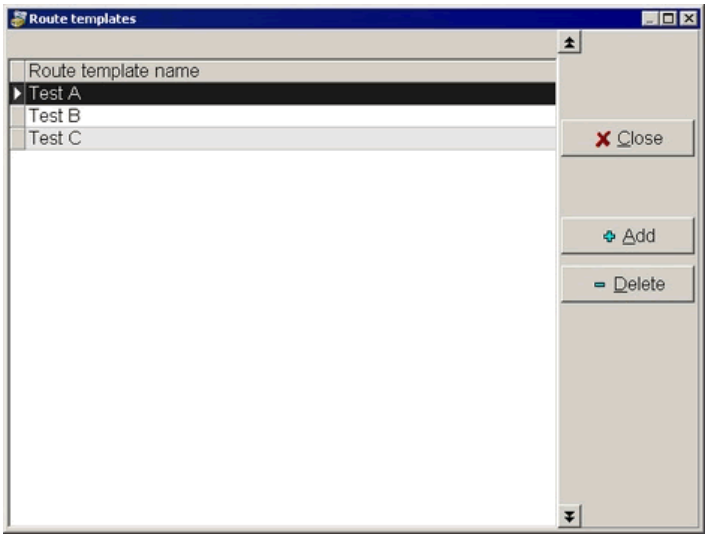
6.2.10.9 Adding or Deleting Route Templates

Before creating a delivery route, a route template has to be created (the route template is basically a name for a delivery route). This operation allows the addition or deletion of route templates. This will be used in the Delivery Route module when creating 545 or editing delivery routes.

1. Click on **Management**->**System Information** from the *Main window*.
2. Click on **Edit**->**Route Templates**. A window opens on the screen.



3. To add a route template press the **Add** button. A window appears. Enter the name of the route template in the field. Press **OK**.
4. To delete a route template, select the specific route template in the list (it will appear highlighted) and press the **Delete** button.
5. When all route templates were added or deleted press **Close** to terminate the operations.

6.2.10.10 Adding a Global invoice note

Global invoice notes will appear at the bottom of all invoices for which the option to display this note is not deselected in the Invoicing 601 module. It is also possible to add notes for a specific customer, and to a specific invoice 269.

To add a Global invoice note:

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Global invoice note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.

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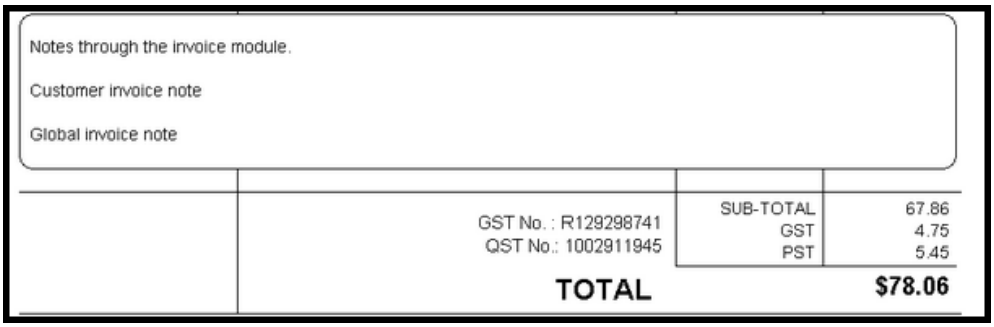


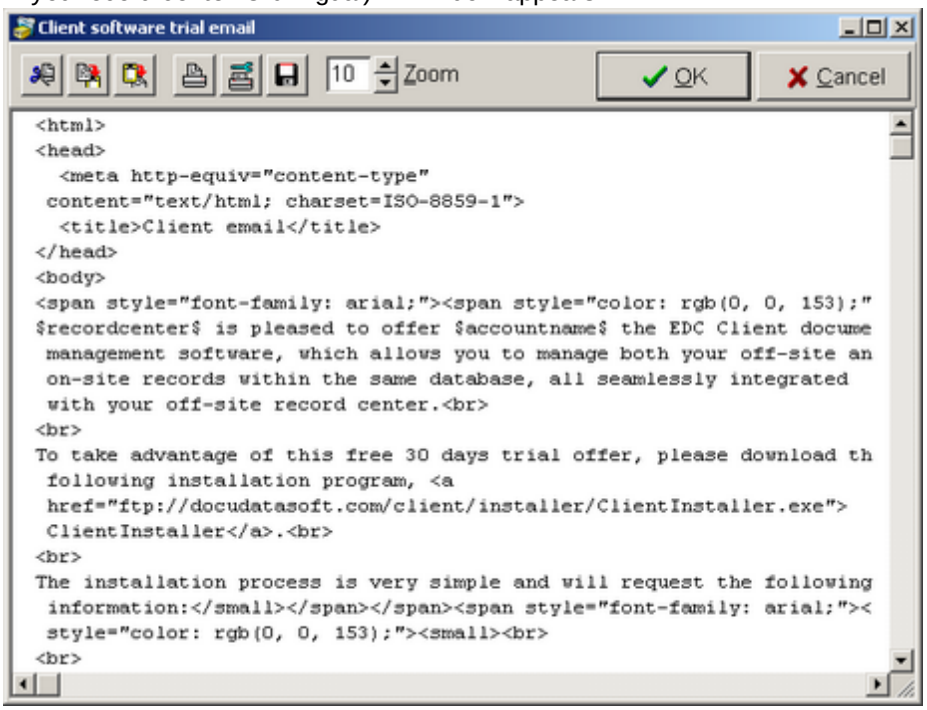
6.2.10.11 Editing the client software trial offer email

EDC ActiveFile permits customers with sophisticated internal records management needs to integrate this management with the management of records at your record center. Selling your customers this software can provide you with an additional source of revenue.

In the Customer->Customer Information module, there is an option to e-mail customers a trial software offer 248.

To modify the content of this e-mail:

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Client software trial email**.
3. Select the language of the message to edit, and click **OK**. (You will probably need to edit both, if you record center is bilingual). A window appears



4. Edit the text directly in the window, or copy it into an HTML editor, make changes, then paste it back in.
5. Click **OK** when finished.

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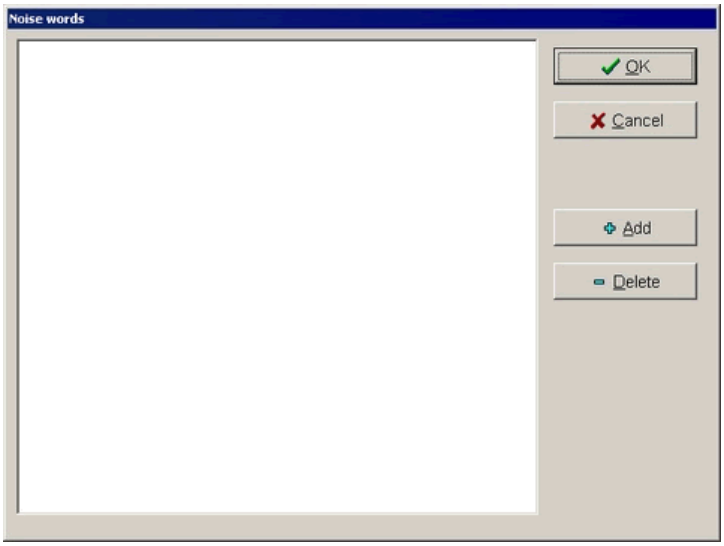
6.2.10.12 Creating Noise Words

This operation allows the creation of noise words to facilitate the Full Text Search[361]. Noise words are usually common words which should not always be included in a search since they are often repeated in a text (*ex:* the, of, his, there, when, is, are.)

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Noise Words**. A window opens on the screen.
3 Select a customer either by entering the customer code or by clicking **OK** to have the list of customers (select a customer and it will appear highlighted). Press **OK**. A window appears.



4 To add a noise word press the **Add** button. A window appears. Enter the new word in the empty field. Press **OK**.
5 To delete a word, select the specific word in the list (it will appear highlighted) and press the **Delete** button.
6 When all words were added or deleted press **OK** to terminate the operations.

Note: If a Noise word is also a keyword in a customer box|file, then the keyword will prevail and the noise word option will not apply.

6.2.10.13 Editing Label Templates

These label templates are the ones used by EDC when printing thermal labels on thermal printers that use Windows printer drivers. This allows you to customize every thermal label template used by the system.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Label Templates**. A window appears.

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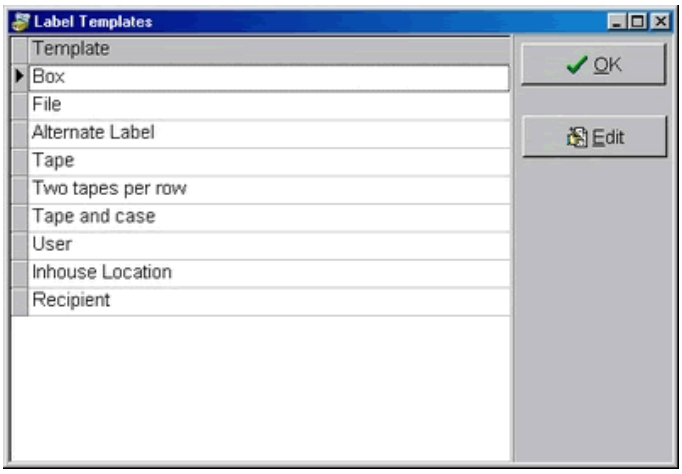
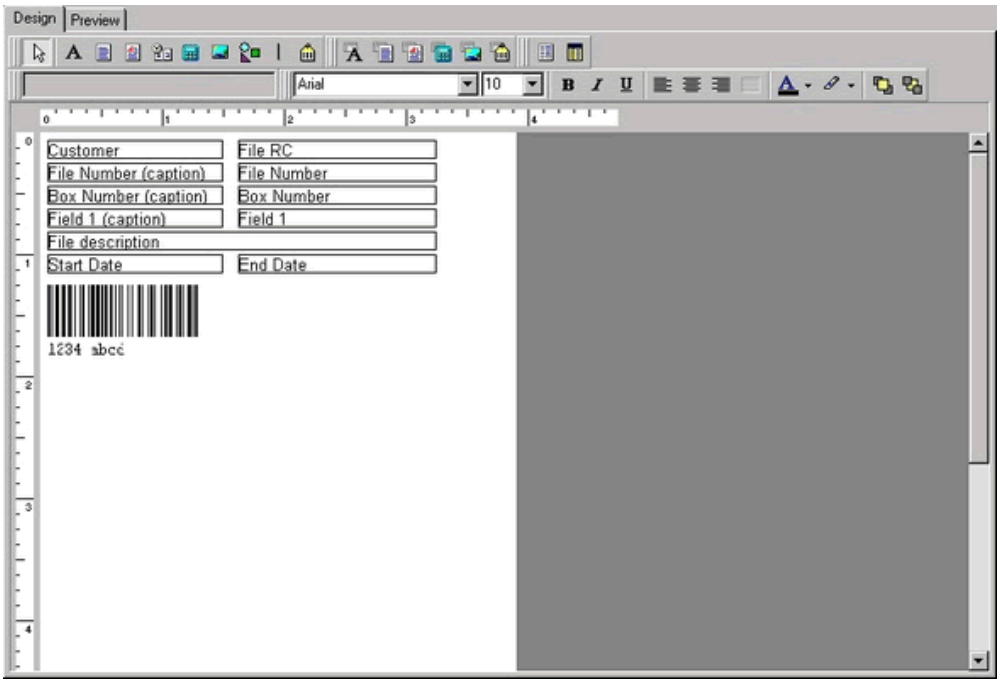


3 Select the template and double click on it or press **Edit**. The template will appear in a window similar to the *SQL Report* module. Here is an example :



The information can be deleted, modified (size or text format) or moved. For more detailed information concerning the modification of label templates, see the Working with the design tab 368 topic.

4 When all the changes have been performed, close the window. The system will prompt you to save the changes. To save the changes press *Yes*, to cancel your modifications press *No* and to make more modifications press *Cancel*.

5 If you have no more templates to edit press **OK**. If you want to modify other templates, repeat steps **1** to **4**.

6.2.10.14 Document separator pages

To facilitate the scanning and importation of many documents, you may print imaging separator pages 330. Place these at the beginning of each file on the scanner's automatic document feeder,

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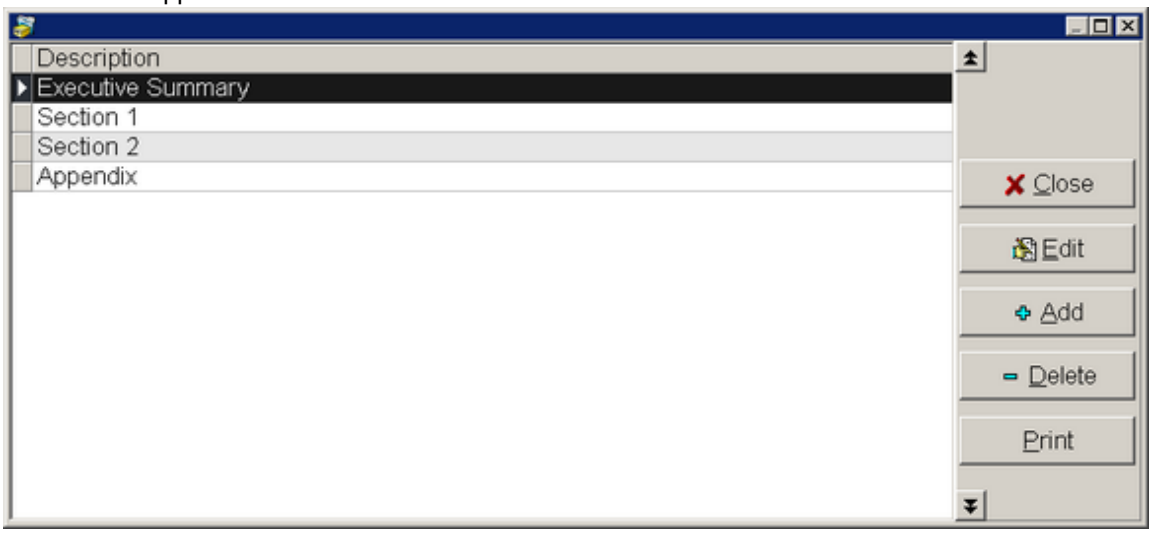
and then process these using a third-party software called DocuScan Pro for efficient import to EDC RC.

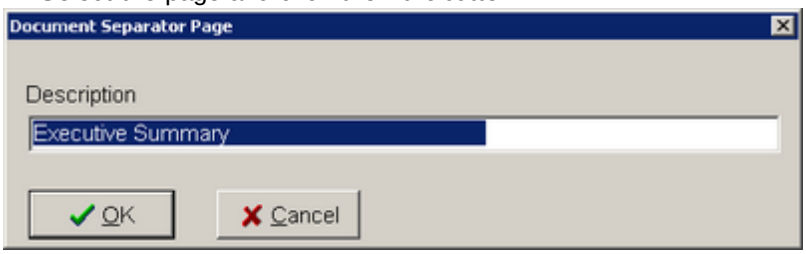
Similarly, if documents frequently require the same image index headings, you may print *Document Separator Pages* to insert at the beginning of each section. When EDC brings in these images, it will recognize the pages and automatically create the image index.

1. In the **Management->System Information** module, select **Edit->Document separator pages**. A window appears.



To edit an existing page

2. Select the page and click the **Edit** button



3. Change the description and click **Okay** or press **Enter**.

To add a new page

4. Click the **Add** button
5. Enter a description and click **Okay** or press **Enter**.

To delete an existing page

6. Select the page and click the **Delete** button
7. Click the **Yes** button to confirm the deletion

To print an existing page

8. Select the page and click the **Print** button
9. An image separator page will print on the laser printer

(This page has numbers for identification and the words "Document Separator Page - " followed by the description, repeated several times, to clearly identify it as an image separator page and not part of the original document. The scanned image of this page is removed and automatically

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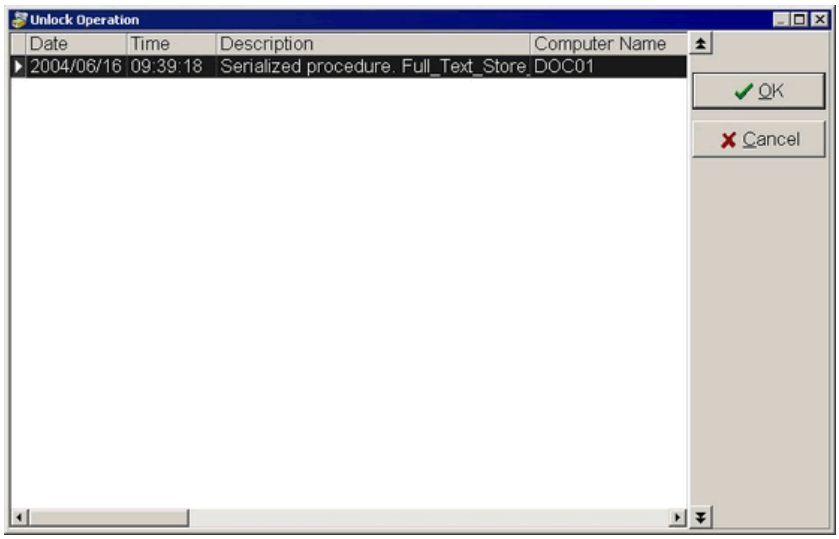
replaced by an index entry upon importation to the database.)

6.2.10.15 View and unlock locked operations

This operation allows to view and to unlock locked tasks. When a task is locked, the module cannot be used by the employees.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Unlock operations**. A window opens on the screen.



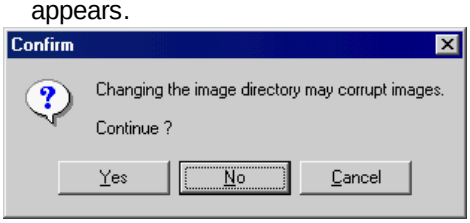
3 To unlock an operation: select the wanted operation (it will appear highlighted) and press **OK**.

Note: The operation called '*Serialized procedure: Full_Text_Search_Store_Index*' should not be unlocked since this automatic procedure is responsible for the indexation of the keywords for boxes and files. It will restart automatically next time you log into EDC if you unlock it.

6.2.10.16 Changing the image directory or document directory

Customers may store electronic documents and scanned images at your record center and these may occupy significant disk space. The current operation allows you to define or change this directory.

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Image Directory**, or **Edit->Documents Directory**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. A window prompts for a password.

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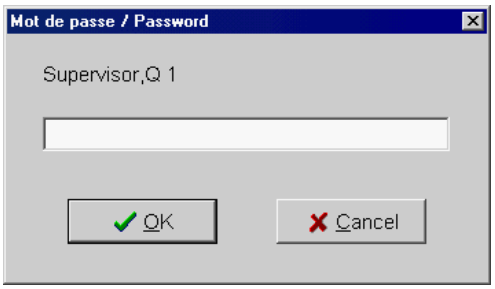
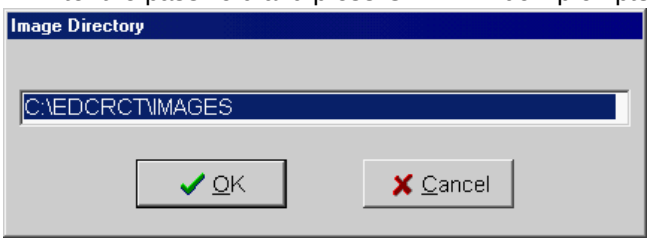


4. Enter the password and press **OK**. A window prompts for the new directory.



5. Enter the new image or document directory and press **OK**.

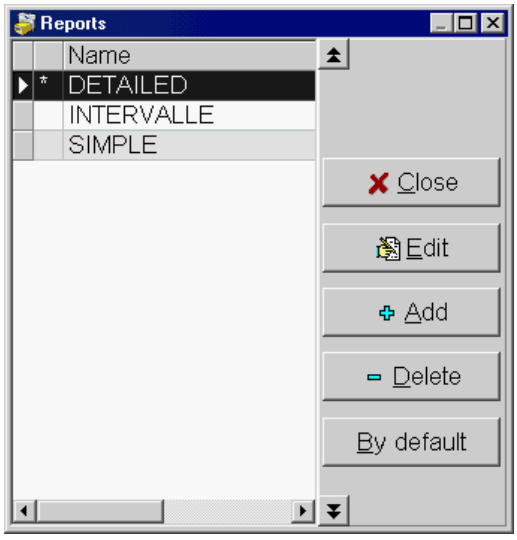
6.2.10.17 Editing the reports of boxes or files and setting the default report

Editing the reports of boxes and files

This operation allows to edit the reports used everywhere in the system and produced for the whole inventory. Essentially, it is necessary to define which fields of the *Box* and *File* modules will appear on these reports and to specify their display order.

Note : The reports set here for customers (**Report**->**Customer**->**...**) are the ones granted to a customer when he is created in the *Customer Information* 271 module.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Report**->**Record Center**|**Customer**->**Box Report Fields**|**File Report Fields**. A window appears.



Note : This window is empty when creating the first report but in this example, it contains reports already defined.

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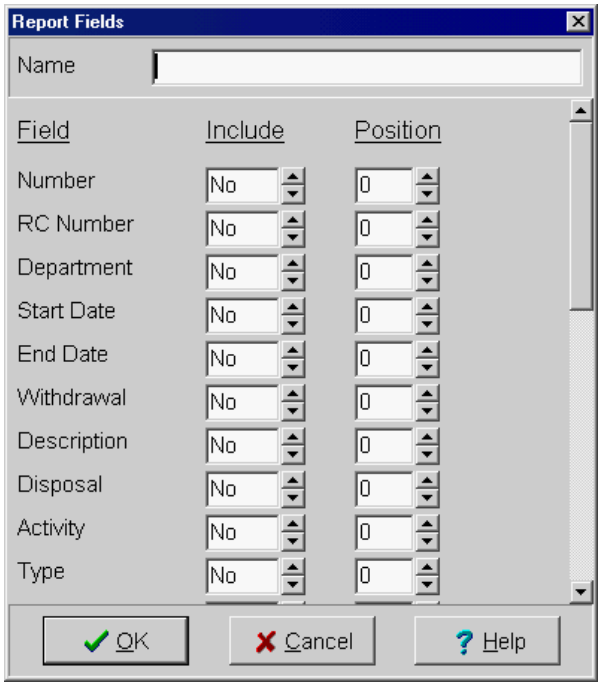
3 Perform one of the following operations :

- To add a report, click on the **Add** button. A window appears.



Note : This window indicates the fields available in the *Box* and *File* modules.

Enter the name that will identify the report everywhere in the system. Click on the choice button of the *Include* column only for fields to be displayed on the report and set it to "Yes". Click also on the choice button of these fields in the *Position* column and set their display order. Press **OK** when finished.

- To delete a report, select it in the list and click on the **Delete** button. Click on the **Yes** button of the dialog box that is displayed to confirm the deletion.

- To modify a report, select it in the list and click on the **Edit** button. The same modifications as when adding a report can be done. Then it is possible to edit the name of the report, its fields and their display order.

4 Click on the **Close** button when finished.

Set the default report

One of these reports can be defined as the one used by default everywhere in the system, unless a specific report is chosen before production and the report options are set in the related module.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Report**->**Record Center**|**Customer**->**Box Report Fields**|**File Report Fields**. A window appears.

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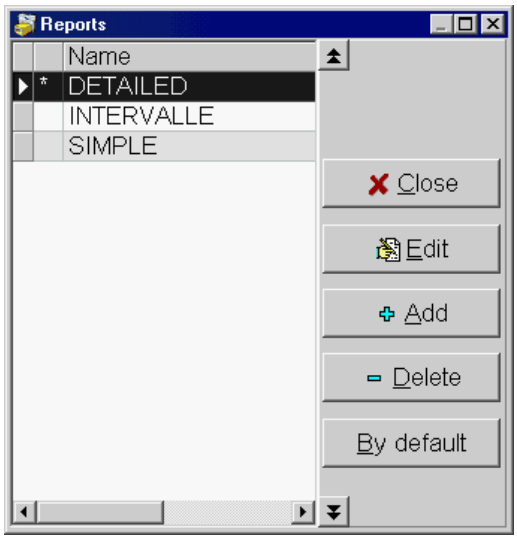

3 Select the desired report (it will appear highlighted) and click on the **By default** button. A small mark will appear in front of the report in question.
4 Click on the **Close** button when finished.

6.2.11 Customer Export

6.2.11.1 Overview (Customer Export)

This module is used to copy and export data belonging to a customer, typically when implementing EDC ActiveFile at the customer's site. It is possible to protect this data with a replication key.

Available reports
- None.

Fields
- None.

Distinctive menu options:

File menu
- Exporting all the data of a customer 220

Module window:

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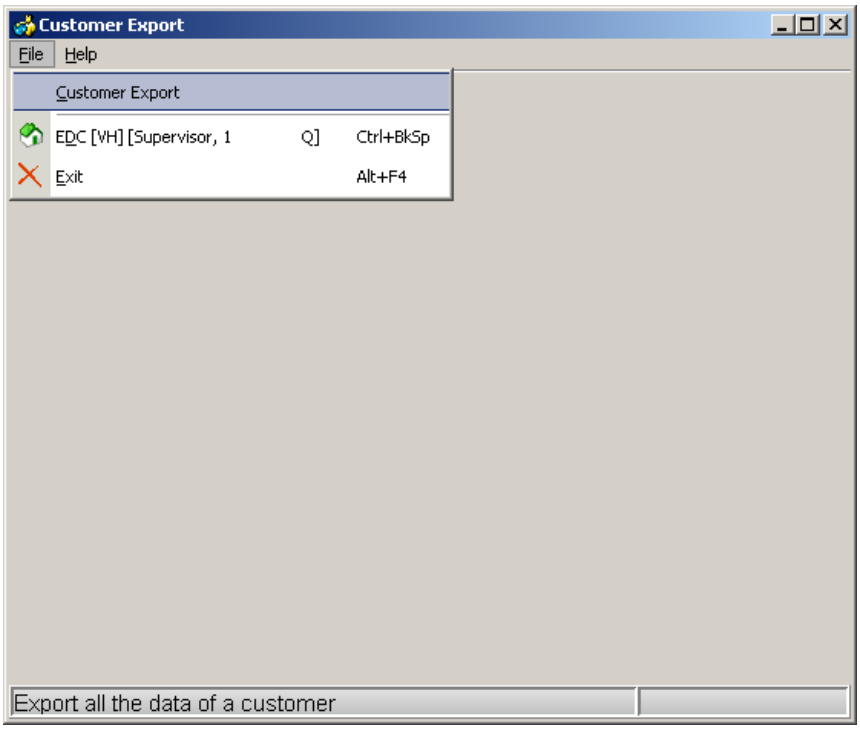
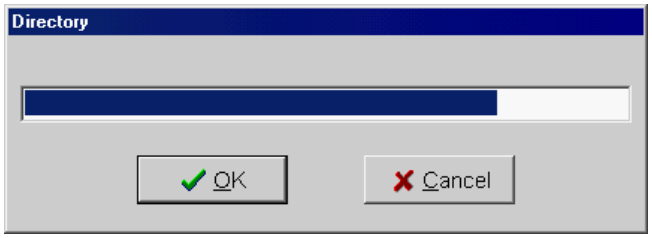


6.2.11.2 Exporting all the data of a customer

1. Click on **Management**->**Customer Export** from the *Main window*.
2. Click on **File**->**Customer Export**. A window opens and asks for a customer code.
3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter the directory where the data will be temporarily exported to and press **OK**. A message appears.

5. Press **OK** when finished. The data will be exported to the specified folder. This can then be used in setting up the customer with ActiveFile. This is typically done with the assistance of support@docudatasoft.com.

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6.2.12 Customer Purge

6.2.12.1 Overview (Customer Purge)

This module is used to permanently remove all the data of a customer from the main database.

The purge of a customer is rarely done. Nevertheless, a customer whose contract with the record center is ending can ask for the retrieval of all its data.

Note: A customer cannot be purged from the system if any of his documents are not in a terminal phase, "DESTROYED", "DELETED", or "TRANSFERRED". Even PRE ADD documents must be removed 466.

Available reports

- None. (See the *Report* 364 module)

Fields

- None.

Tasks

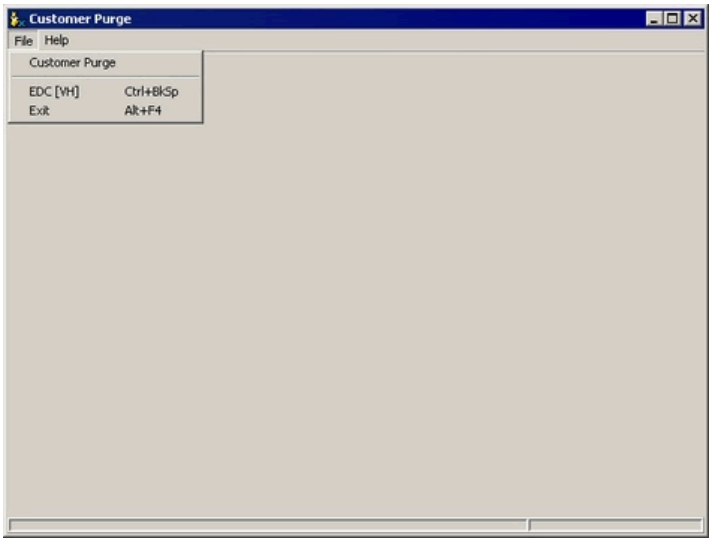
- Purging all the data of a customer from the system 222

Distinctive menu options:

File menu

- Customer purge

Module window:



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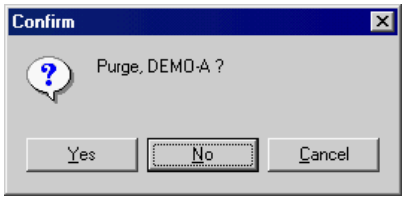
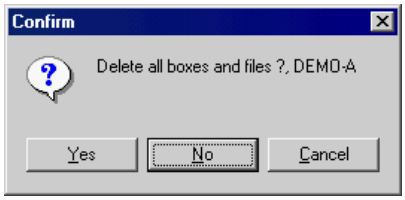
6.2.12.2 Purging all the data of a customer from the system

The purge of a customer will remove permanently from the system all his inventory data, such as box and file listings, departments, documents types, etc. The data about billing, orders, deliveries, etc, will be kept.

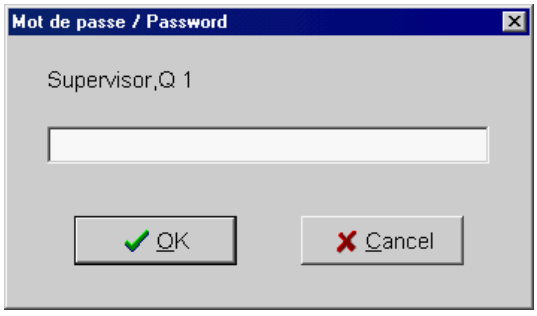
1 Click on **Management**->**Customer Purge** from the *Main window.*
2 Click on **File**->**Customer Purge**. A window opens and asks to specify which customer is concerned.
3 Enter the code of the desired customer and press **OK**. A dialog box appears.



4 Click on the **Yes** button to confirm the purge. The system displays a new dialog box, in order to confirm a second time the purge of all the inventory data of the selected customer.



5 Click on the **Yes** button to proceed. A window opens for authorization.



6 Enter the password and press **OK**. The system automatically purges the selected customer. All the deleted data will not be retrievable. A message appears and confirms the purge.

6.3 Customer Management (Customer tab)

6.3.1 Outline (Customer)

The *Customer* tab contains modules for providing individualized service to each customer. (The related Customer Pricing 640 module is found on the Accounting Tab 589).

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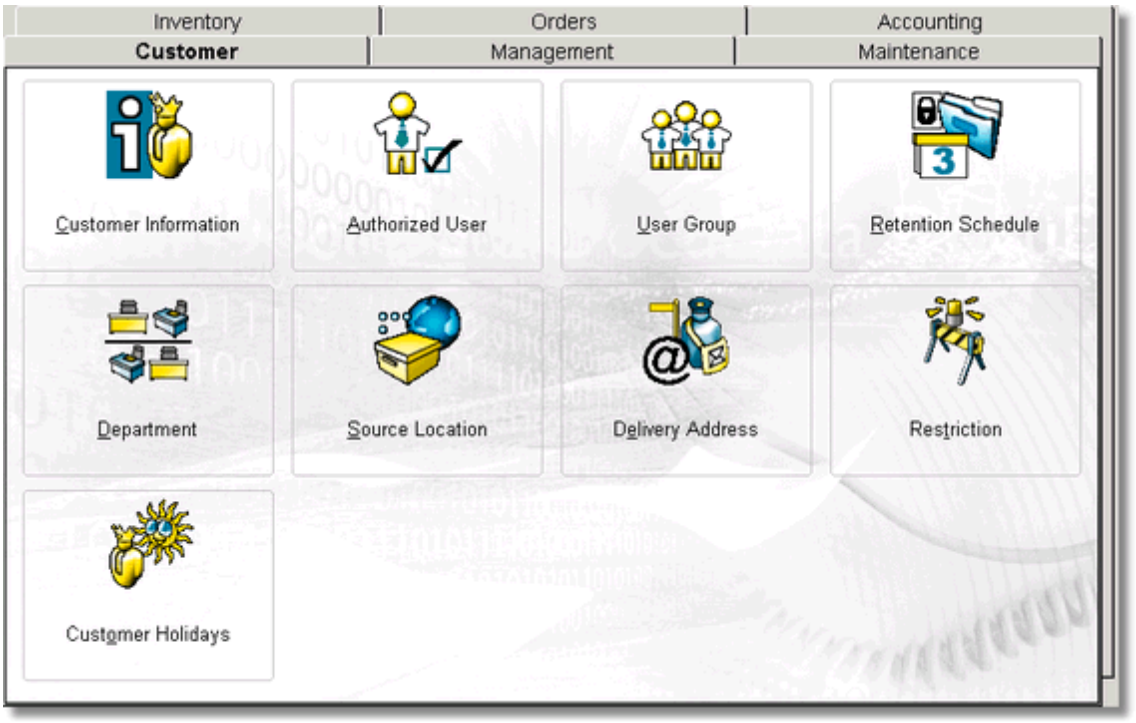

Modules

- Customer Information 223
- Authorized Users 275
- User Groups 283
- Retention Schedule 286
- Department 292
- Source Locations 298
- Delivery Address 300
- Restrictions 303
- Customer Holidays 305

6.3.2 Customer Information

6.3.2.1 Overview (Customer Information)

The *Customer Information* module is used to configure parameters that apply to a customer company as a whole, and to specify default parameters that apply in the creation of that company's authorized users.

Available reports

- Report (a list of all customers)
- Customer details (detailed list of all customers)
- Current customer (detailed report)
- By creation date
- By renewal date

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- Replicated customers (list of customers connected by ActiveFile software)
- Customers with manual invoices

Fields 225 (see the next section)

Tasks

- Adding, viewing or editing ordering notes 268
- Setting up to automatically e-mail delivery or return slips 273

Distinctive menu options:

File menu
- Print mailing labels 242 for one or more customers
- Send batch emails 243
- Export email addresses 241
- Batch full text search activation 246
- Add customer accounts 247
- Email client software free trial offer 248
- Prepare client installation 249
- Export boxes 249 (Export box data to spreadsheet)
- Export files 249
- Export images 347

View menu
- Password 252
- Signing officer 267 (for authorizing destruction lists)
- License 252
- Notes 271
- Invoice reminder note 270

Edit menu
- Adding a new customer 252
- Copy and add 252 (adding a new customer from an existing one)
- Generate web licenses 255 (Generate new web licenses and modify existing ones)
- EDC ActiveFile trial license 257
- Remote access license 257 (Edit the quantity for ActiveFile trial)
- Web license 258 (manual method if unable to DocuData server)
- Field definitions (Box | File | 258 Copy field definitions to other customers 261) 258
- Web searches (Web searches | 262 Copy web searches to other customers) 261
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- Labels 264
- Signing officer 267
- Add default delivery address 268
- Notes 271
- Ordering notes 268
- Invoice Notes 269
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- Delete reminder invoice notes 270

Report menu
- Box report fields 271 (Adding, configuring or deleting default or custom reports for a customer 271)
- File report fields 271

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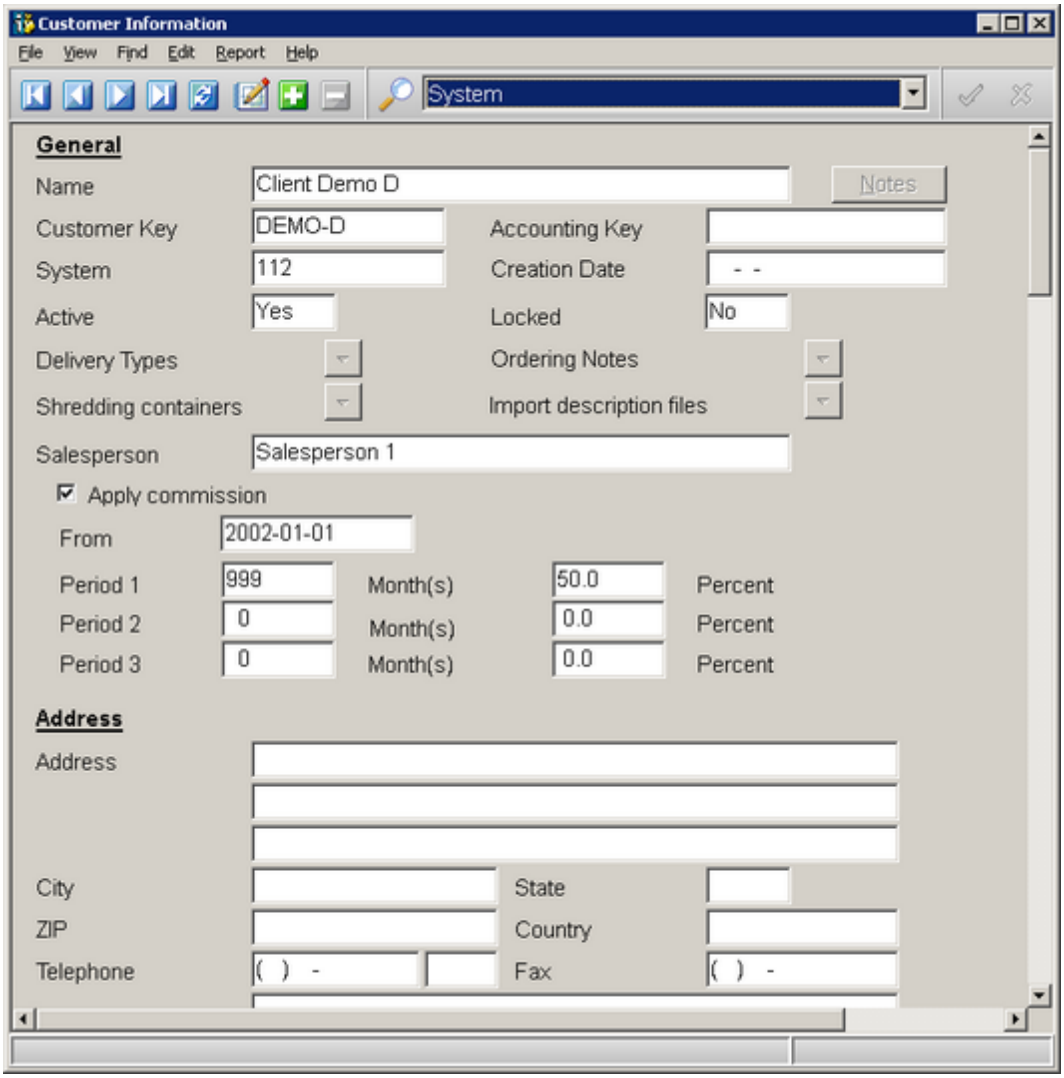
Module window



6.3.2.2 Fields (Customer Information)

General

Name
Company name.

Customer Key
Enter a unique code that will identify the customer at the record center. This code is used widely throughout the system, such for order entry and inventory searches. It commonly appears on box and file labels, and is used by your customers in accessing ActiveWeb.

Accounting Key
If you export your invoices 602 to an accounting system and this system uses a different key for this customer, you may enter an accounting key of up to 30 characters here. With departmental invoicing, this value may be overridden in the Accounting->Departmental Invoicing 651 module.

System

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This system-assigned number cannot be modified and is unique across all EDC installations world-wide. It identifies the customer account in the system. It appears as the middle segment on box and file barcode labels. This means that if you receive boxes that have boxes that have been labeled with EDC labels from another record center, they will not duplicate your own.

Creation Date
The date that the account was created.

Active
Set this field to "No" when a customer is no longer an active customer. This customer will cease to appear on lists, and it will no longer be possible to accept orders or create invoices for them.

Locked
Choice field containing "Yes" or "No". Setting this field to "Yes" prevents the customer from accessing ActiveWeb or placing orders at the record center. This option is typically activated in order to encourage customers to pay overdue bills.

***Delivery Types**
Drop-down field associated to a list defined in the Delivery Type 621 module.
This field allows to specify the delivery types that will appear on the choice list of the Orders module.

Ordering notes
Field that allows the addition of complementary notes to the orders.

***Shredding containers**
Drop-down field associated to a list defined in the Shredding Container 442 module. These container types will be available to the customer.

Import description files
Import description files enable you to import box and file information for customers. Clicking this drop-down box allows you to make these available for your customers to import properly-formatted spreadsheets on ActiveWeb.

***Salesperson**
Alphanumeric field that can contain a maximum of 30 characters.
This field indicates the name of the salesperson of the customer.

Apply commission
If selected, transactions related to this customer will be included in the calculation of commission on the commissions report 273. Commissions are calculated from the **From** date, at the specified **Percent**, for the specified **Period**(s).

Address
Customer's contact information, such as his main address, telephone number, fax number or email address.

Exclude from mail list
If this option is not selected, this email address will be available to be included when sending batch emails 243 through EDC and when exporting email addresses 241.

***Billing**

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Bill to
These fields contain address information used on customer invoices. If no information is entered, the default customer address is used.

Attention
Information used for mailing labels.

Email
This field allows to enter the customer's email address (in order to facilitate communication or to send invoices --- see the billing settings a bit further)

Auto Invoice
Choice field containing "Yes" or "No".
When this field is set to "Yes" the customer is added to the selection list for automatic invoices, which are produced from the Billing module.

Net days
This numeric field is only used as a reference, it represents the payment terms for the customer. This appears on the invoice at the top right of the invoice.

Default Charge Code (significant when the Billing field is set to "Charge Back").
This field allows to enter the charge code used by default for billing purposes when no specific charge code has been chosen for the customer.

***Billing**
Choice field containing "Regular", "Department" or "Charge Back".
According to the value entered here, the customer charges will be grouped (Regular), divided by department (Department) or divided by charge codes (Charge Back). The value of this field will have an impact on the display of the invoices.

Note: For customers billing by Department, one should create departments in the Department module of the Customer section. One should also go in the Department Billing module of the Accounting section in order to enter specific information concerning the invoicing for each department.

Invoice Start Month
Choice field that can contain any month of the year.
This field indicates when the customer was billed for the first time in the year. It is generally the month when the first box was received at the record center.

Invoices/Year
This numeric field allows to specify how many invoices are sent to the customer each year.
When the field Invoices/Year is set to 6, the customer will receive 6 invoices in the year.

Note : The Invoice Start Month and the Invoices/Year fields have an impact on the auto-creation of invoices for a specific month. When the Auto Invoice field is set to "Yes", it only means that the customer is added to the selection list for these invoices, but does not mean necessarily that he will receive an invoice every month. For example, auto creating invoices for June will not include a customer which is billed 4 times a year and whose invoice start month was February, because normally this customer receives an invoice in February, May, August and November.

Min. Cost/Month
This field indicates the minimum amount to charge a customer every month. If incurred charges are

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less (storage fees, services, etc.), and adjustment will be applied for the difference. If the **Storage** box is checked, the adjustment calculation will consider only storage fees. In this case, it will not be applied until the customer has boxes in inventory. The description on the invoice is taken from the price code MINV, but the price is taken from this field in the customer information module.

Separate Rent Invoice
Choice field containing "Yes" or "No".
When this field is set to "No" it means that the rent will be charged with the rest.

Rent Inv. Start Month
Choice field containing the months of the year.
It indicates the month that the invoicing will start for the rent.

Storage Invoices/year
Numeric field containing numbers from 0 to 12.
It indicates the number of times per year the invoices will be sent for the rent.

Note: When billing the rent and the service separately, the number of rent invoices per year must be smaller than the number of service invoices a year.

***Page brk. detailed inv.**
When setting this field to "Yes", it allows to separate the invoices (created in the Invoice module) in several pages when they have different departments. For example, if a customer has several departments, the invoices for one department will appear on one page, the invoices for another department will appear on another page, etc.

***Billing Building**
This field indicates which building of the record center is sending the invoices.

Taxable
Choice field containing "Yes" or "No".
When this field is set to "No" it means that the applicable taxes cannot be added to customer charges. This can be useful when the customer is a government agency which is not liable to taxes.

Hide zero lines on invoice
With this option set to "Yes", invoice lines with 0 total charge will not appear on the invoice, the detailed invoice, or the delivery summary.

Business
Drop down field associated to a list defined in the Business Type 183 module.
This field allows to specify the business type to which belongs the customer.

Highwater storage
Highwater storage billing is an option for billing in arrears based on the highest storage volume during the period.

- The system finds the day during the invoicing period when the number of boxes was at highwater and bills for storage for that period based on that day.
- If billing by department, the departmental breakdown is based on the breakdown on the day that had the highest volume.
- A temporary global invoices is created (as if the account is not invoiced by department), then charges are then split into departmental invoices, with any unallocated charges being billed to the

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main account invoice.

Purchase Order
This field allows to enter a purchase order number that will appear on the customer's invoices. For accounting needs, big organizations frequently resort to this behaviour, in order to easily track the expenses of their subsidiaries.

Renewal Date
This field indicates the date when the contract between the customer and the record center is ending and should be renewed.

Charge Rent
Choice field containing "Forward" and "Arrears".
When set to "Forward", the rent will be charged for the month to come.
When set to "Arrears", the rent will be charged for the past month.

Storage Calculation
Choice field containing "Daily" or "Monthly".
This field allows to specify how the volume of boxes in storage is counted.
When this field is set to "Daily", the volume is counted on a daily rate and according to the exact number of days in the month, as 28 (February), 30 or 31 days. When this field is set to "Monthly", the customer is billed for a monthly rate, whatever the number of days in the current month.

Storage Credit
Choice field containing "Yes" or "No".
When this field is set to "Yes", a storage credit is applied to prorate for storage that was canceled during the month. This is based on the date of the delivery created by the system to bill for the disposal or the space cancellation.

(see the Rent from..to 592 field in the Invoicing module for more details).

Days per year daily billing
Daily billing calculates storage charges based on the number of days in the month. Certain customers may have contracts that convert between daily, monthly, and annual charges based on eg. 360 days per year or 30 days per month, which leads to a higher annual revenue. Changing this value allows you to use this billing method. The daily rate does not adjust for leap years.

***Courier Billing**
Choice field containing "Container", "Item","Delivery", "Round trip item", "By item type" or "Item type round trip".

- Delivery: The price code 622 of the delivery type is applied once, without considering the number of items included.
- Container: For the outgoing delivery, price code 622 of the delivery type is multiplied by the quantity of containers on the outgoing delivery, which is manually entered during truck validation. For the return delivery, the return price code of the delivery type is multiplied by the quantity entered in the return delivery module (specifying the number of returning containers). See Automatic container billing 230 below.

A trip charge is not typically used with this billing method. Note that if the trip charge is used, any free items should be applied through price breaks rather than on the trip charge price code.

- Round trip Item: The price code 622 of the delivery type is multiplied by the total number of

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scanned boxes and files. If an item is scanned going out and scanned coming back it, it is counted twice.

- Item: For the outgoing delivery, the price code 622 of the delivery type is multiplied by the total number of scanned boxes and files. For the return delivery, the total number of returning items are charged at the return price code specified for the delivery type 622.
- By Item Type: Delivery handling charges for each box or file are taken from the box type. For outgoing items, the delivery price codes are used. For returning items, the return price codes are used. For open shelf files, the require price code OSDL is used for delivery and OSRT is used for return.
- Item Type Round Trip: Delivery handling charges for each box or file are taken from the box type. the delivery price codes are used for both outgoing and incoming items. For open shelf files the require price code OSDL is used for delivery and OSRT for return.

Automatic container billing _ Files per container
This option applies when the courier billing method above is by container. Instead of requiring the number of containers shipped to be manually entered, the system will calculate the number of containers as

(# of boxes shipped) + (# of files shipped / "Files per container", rounded up to a whole number)

Note that charges for handling of containers of files are followed by "(File)" on invoices and charge summaries for clarity. The price per container is calculated by dividing the total cost for handling of contrainers (including boxes and containers of files) by the total number of containers.

***Service only**
Choice field containing "Yes" or "No".
When this field is set to "Yes", it means that the customer is not storing any boxes at the RC (usually these clients are the ones that only buy line items.)

Bill Full month add/del
Choice field containing "Yes" or "No".
When this field is set to "No", the boxes that were added or deleted in the inventory are billed for the real storage time (see the Rent from..to 592 field in the Invoicing module for more details). For example, a box added on November 20th will be billed for 11 days in storage (November 20th to 30th) and not for the full month.

***Use box types**
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be considered as a box type user, which means that box types will be used to compute rent and service charges (according to the settings in the *Box type* 625 module). If the field is set to "No", the box types won't be used at all, instead the default price codes will be used for service and the rent will be calculated by volume. See also the Courier billing 229 field to see how this option affects the invoicing.

Hourly Rate
This field indicates the hourly rate the customer is charged for labor.
For example, when a customer retrieves a non track file from the inventory, an employee has to search for this file in the box. The customer is then charged for the retrieval and for the search time. Note that this rate is used in place of any value entered for price codes with a measure of time as units (eg. minutes or hours).

***Invoice Format**
Choice between *Paper* and *Electronic*. When the *Paper* box is checked the invoices will be printed

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and sent by mail. When the *Electronic* box is checked the invoices will be sent by email either in the PDF format or the TIF format. Note that both options can be available at the same time.

***File Tracking Charge**
Choice field containing "Yes" or "No".
When this field is set to "Yes", the RC will charge a certain price for tracking files (in-box or on shelf.) Make sure that you set the right price in the General Pricing 632 module (FTK0).

Minimum Touches Box Change Charge
Numeric field that is used to determine if a box can be billed for a box change.
For each customer, the minimum number of "touches" on a box is configured. A cardboard box change is billed if a box has reached or exceeded the minimum number of "touches", since the last box change or since the box has entered the record center for the first time.

A touch is considered one of the following:
- The box has an OUT history, ie, has been ordered
- One or more files in the box have an OUT history, ie, files have been ordered.

There is a maximum of one touch per day. This is to prevent "noise" touches, ie, if 10 files get pulled from the same box on the same day, this only counts as one touch.

See also the Box Chg Delivery Type 201 field in the *System Information* module.

Quickbooks Class
Alphanumeric field that can contain a maximum of 40 characters. This field is used in exporting invoice information to Quickbooks. If a value is not defined in customer information, the value from System information will be used by default.

No charge boxes out
Selecting this option causes storage charges to not be applied for boxes that are out at the time of invoice creation. This option is rarely used, as it is not industry standard behavior.

Web access fee
Choice field contains values "By Item Count", "By User Count", and "None".
- None: No web access fee is applied through this feature.
- By Item Count: The price code to the right will be multiplied by the total count of boxes, files and/or images, depending on which **Count** options are selected. Charge will be broken down by department based on the number of items of the select types belonging to each.
- By User Count: The current number of web licenses is multiplied by the price code to the right. Charges will be billed to the department selected in the **Bill to** choice field.

If the customer uses charge back 227 billing, this web charge will be billed to the default charge code.
The charges will be defined on a monthly basis and appear on the service invoice.

Options
Delivery Time
Choice field containing "Both", "AM" or "PM". Effective only when the *Delivery Cycle* 197 field in the *System Information* module is set to "Twice a day".
This field determines when the orders for this customer can be delivered.

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Pick up time
Choice field containing "Both", "AM" or "PM".
This field determines when the customer's courier can pick up the orders at the record center.

Container Type
- Tape only: With this option, customers will see ActiveWeb with vocabulary and icons defined in terms of tapes. They cannot store boxes and files in this account, and do not have access to related functions.
- Box and tape: With this option, boxes and tapes can be combined in the same account. Tapes are treated as a special box type, with different labels.

Hide quantity from delivery/ret. slip
When set to "yes", the quantity of containers shipped and returned will not be included in the delivery and return slips.

Language
Choice field containing "English" or "French".
This field indicates the language used by the customer to communicate with the record center. This language is also used to produce the customer's reports.

Types by department
Choice field containing "Yes" or "No".
When this field is set to "Yes", document types are associated to departments in the *Retention Schedule* module. This will make a difference when creating pre add boxes (the software will only ask for the type) and when verifying the integrity of boxes.

Non-track warning
Choice field containing "Yes" or "No".
When this field is set to "Yes", a warning message appears if a customer tries to order a non track file that was already ordered in the past.

Range Mask
This field allows to set the range mask for the *Range* field of the *Box* and *File* modules.

Delivery Labels
Choice field containing "Yes" or "No".
When this field is set to "Yes", a label is printed and affixed on boxes when they are retrieved from the record center. These labels contain some information, as box number, bar code number, recipient, delivery address and date.

Minimum password length
When new passwords are entered for a customer, the system will verify that passwords are greater than or equal to this length.

Force Passwords
Choice field containing "Yes" or "No".
When set to "Yes", authorized users at this company must have a non-blank password.

Alphanumeric passwords
Choice field containing "Yes" or "No".
When this field is set to "Yes", new passwords for authorized users must contain at least one number and at least one letter.

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Note : When this field is set to "Yes", a non-blank password is required for all authorized users.

Type Integrity
Choice field containing "Yes" or "No".
When its value is "Yes", this field indicates that all the files contained in a box must be of the same type as the type of the box.

Restriction Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", it indicates that the files within a box cannot be assigned a restriction that is not already assigned to the box. For example, a box with the "X", "Y" and "Z" restrictions can include files that do not have restrictions and files with the "X" restriction. However, files with the "O" restriction could not be included in that box.

Note : If the type integrity is set to "Yes", the value of the *Restriction Integrity* field will have no effect since restrictions are associated to document types.

Department Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that all files included in a box must be of the same department as the box.

Disposal Date Integrity
When this value is set to "Yes", EDC will reject an attempt to move a file into a box that has an earlier disposal date than the file.

Replication
Field containing "Yes" or "No".
This field cannot be directly modified. It becomes "Yes" when a customer is set up to use EDC ActiveFile. In this case, data will be periodically synchronized between the record center and the software at the client site.

Disposal Type Integrity
When this value is set to "Yes", EDC will reject an attempt to move a file into a box that has a different disposal mode than the file.

Return to
This field determines the inscription displayed on labels for boxes and files that are out, and also indicates where these items have to be returned later.

Location Mask
Alphanumeric field containing a maximum of 20 characters. This applies to the format used for specifying locations at the customer site using ActiveFile.

Note : The location mask should be carefully thought out so that it accurately reflects the physical storage organization.

Default Box Volume
Numeric field containing a maximum of four digits.
This field allows to select a default box volume for all the new boxes added to the inventory. This will typically correspond to the volume of a defined box type 625.

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Data capture before accession
When this option is set to 'Yes', if an item created through Auto create preadd Box | File | Tape 481 comes into the record center through the return delivery module for the first time without having been modified through ActiveWeb, ActiveFile, or some other means of capturing data, an error will be recorded in process errors (see Reconciling process errors 576) and a notification e-mail listing the delivery number and the items not captured will be sent to the same e-mail address that delivery slips are sent to.

Volume Equivalence, box = Location
This field is used to indicate that boxes of a specified size may be put into locations of a different specified size.

For example, if the *Volume Equivalence, box* field is set "1.50" and the = *Location* field is set to "1.20", a box identified and billed as "1.50" may be stored in a location allocated for 1.20.

Order PRE ADD Files
Choice field containing "Yes" or "No".
When the field is set to "Yes", a customer can order PRE ADD files.

Hide "Perm Out" option
When set to "Yes", the option to flag boxes and files as "Permanently Out" will not appear at order entry through EDC RC, ActiveWeb, EDC Client, or Active Web for this customer.

***Validate Date Range**
Choice field containing "Yes" or "No".
When this field is set to "No" the system will not validate if the *Start Date* is before or after the *End Date*. This will apply for boxes and files.

Extra delivery slip per order
If set to Yes, one more delivery slip will print for this customer than the default amount.

***File out cards**
Choice field containing "Yes" or "No".
When this field is set to "Yes", an out card is automatically printed and inserted into the box to replace a file that is moved out.

***Open shelf out cards**
Choice field containing "Yes"" or "No".
When this field is set to "Yes", an out card is automatically printed and placed on the shelf to replace a file that is out.

File to search conversion
Choice field containing "Yes" or "No.
When this field is set to "Yes". if a customer places an order for a file and the file is not found, he will be billed for a file search instead of a file retrieval. The delivery slip will indicate "Excluded item" but the invoice will indicate "Search service" and not "File picking".

A record is added to the Non Track File module. If the file record did not exits prior to the order, the file record is deleted. If the record did exist, it is not deleted, and a history of "EXCLUDED" is added to the original file record.

Sealed Box

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Choice field containing "Yes" or "No".
When this field is set to "Yes", a customer's boxes must never be opened at the record center, even to inventory files within a box. When this customer places orders for files, he will receive the entire box.

Limit to one building
Choice field containing "Yes" or "No".
When this field is set to "Yes", it means that all the customer's boxes have to be stored at one place only, especially when the record center has many buildings.

Building
This field is only significant when the previous field is set to "Yes". It indicates the only building where the customer's boxes can be stored. Furthermore, this building code will appear on the delivery slips for that customer and will guaranty the return of its documents to the right building at the record center.

Has split
This field indicates if the customer has been divided. Clearly, it means that some of a customer's boxes (generally from a complete department or sub-department) have been transferred to another customer's account.

Unique file number
Choice field containing "Yes" or "No".
When this field is set to "Yes", every file added to the inventory for that customer must have a single number, otherwise the system will reject the addition and will mention that its is a duplicate file.

Time with by date order
Choice field containing "Yes" or "No".
When this field is set to "Yes", it will be possible to indicate a specific time for delivery when placing an order by date in the *Order* module. A note will appear at the bottom of the delivery slip and will indicate the time in question.

Order Grouping
Choice field containing "Yes" or "No".
When the field is set to "No", a separate delivery is created for each order placed by this customer. When it is set to "Yes", regular and by date orders for the same delivery cycle and address with compatible delivery types will get grouped onto a single delivery when deliveries are created.

By time orders are always grouped immediately onto their own deliveries.

Tape Number Change
Choice field containing "Yes" or "No".
When this field is set to "Yes", it authorizes to change the tape numbers in the *Box* module.

Immediate Delivery
Choice field containing "Yes" or "No".
When this field is set to "Yes", the "Regular" and "By Date" orders are grouped separately and each of them has a delivery created immediately.

Default box number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for

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automatic box numbers. When the RC number of the box is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect. A typical value of 5 would accommodate 99,999 for a given customer.

Automatic box number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for boxes added to the inventory; it attributes them a default number that matches the RC number padded to the correct number of digits, if available. If this number has already been assigned as a box number for the customer, the RC number followed by a dot and the first available digit that makes it unique will be used. (eg. 00001.1).

When this option is set to "Yes", a check box to make the field "Read Only" appears. If selected, the system will prevent you or the customer from modifying the box number.

Default file number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for automatic file numbers. When the RC number of the file is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect. A value of 7 accommodates 9,999,999 files per customer.

Automatic file number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for files added to the inventory; it attributes them a default number that matches the RC number padded to the correct number of digits, if available. If this number has already been assigned as a file number for the customer and file numbers are set to Unique, the RC number followed by a dot and the first available digit that makes it unique will be used. (eg. 0000001.1).

When this option is set to "Yes", a check box to make the field "Read Only" appears. If selected, the system will prevent you or the customer from modifying the box number.

File in box tracking
Choice field that can contain "Yes" or "No".
When this field is set to "No", the record center can return boxes of a customer without scanning all the inventoried files that they contain. The system assumes that the boxes are complete and all the files they contain are also registered as IN.

Use ID cards
Choice field containing "Yes" or "No".
When this field is set to "Yes", the person that receives documents at the customer's office must show an ID card to the driver of the record center. This ID card proves that he is authorized to receive documents and to sign delivery slips. Furthermore, there is an additional line on delivery slips, that allows to indicate if the person had his ID card when the documents were delivered.

Note : Any personal ID card can be requested, every record center has its own procedure. The best would be to request an ID card with a bar code and a picture, created by the record center and given to authorized users after receiving an official demand from the customer.

PDT Number Change
Choice field containing "Yes" or "No".
When this field is set to "Yes", when scanning a box or file with the PDT, it will be possible to

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assign a customer number. The customer box/file number will be changed in EDC, and a history will be added if a new number is assigned with the PDT. When the number changes, the Old Number field in the box and file tables will be updated.

Position of extra fields
Choice field containing "Top" and "Bottom".
This field determines if the extra fields will be at the bottom or at the top of the *File* module window.

Delivery with PDT 138
Choice field containing "Yes" or "No".
When this field is set to "Yes", the option to deliver with PDT can be used for the current customer. When arriving at the customer's site, this option allows to scan the delivery bar code, the items included in the delivery and also the returning items. This increases the reliability for delivery and return of documents.

Bar code on file pick label
Choice field containing "Yes" or "No".
This field is set to *No* by default. If it is set to *Yes*, the file bar code will always be printed on file picking labels. If the file has an alternate label, the alternate label will be removed. IF it is set to "No", the file picking label must not cover the original file bar code.

Truck Validation
Choice field containing "Yes" or "No".
When this field is set to"Yes" it activates the Truck Validation option in the Delivery verification module, so the customer will have access to it. This option allows the verification and validation of all the items that must be delivered to a customer.

Double Pick
Choice field containing "Yes" or "No".
When this field is set to "Yes", double picking is possible. *Ex:* when scanning a box or file with the PDT and setting it as "not found" on the PDT, after downloading the list to the software, the item goes back in the Picking List module to be picked since the option is set to "Yes". If the item as been set as "not found" a second time, the item is set to "excluded".

Full Text Search at RC
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer has access to the *Full Text Search* section in the *Inventory* module.

Show end of rotation on delivery slip
Choice field containing "Yes" or "No".
When this field is set to "Yes", a reminder will appear on the delivery slip for tapes that are being delivered for the last date on their rotation schedule. This reminder appears in bold, above the signature field.

***Recycle After Destruction**
This option was created for specific needs and may not apply to your operations.
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer has the possibility to recycle his tapes. After the destruction list is uploaded to the PDT, the tapes with the recycle option are scanned by the PDT; the user is then asked to scan a transit location. The tapes' status will be changed to IN in the transit location, while the files (the content) from the tape will be destroyed.

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***Use Expected return dates**
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be prompted to enter an expected return date when he creates an order. Each file and box will then be associated with this return date.

Simple Web Interface
Choice field containing "Yes" or "No".
When this field is set to "Yes", some graphics in ActiveWeb will not be displayed. This is done to maximize the space available on screen and to reduce the refresh or loading time of the web page.

Web Time Out
Numeric field determines how many minutes a web connection can remain inactive before the session is automatically terminated for security reasons, after a warning message is ignored. The value can also be set to 'default' (which is typically 15 minutes). It can also be specified for individual users in the *Authorized User* module.

Notes on paper pick list
Choice field containing "Yes" or "No".
When this field is set to "Yes", the first 400 characters of notes are included as a single line for boxes on paper picking lists.

Default by date order time
Choice field containing "AM" or "PM", specifying the default delivery cycle for *by date* orders.

Hide labels module on web
Choice field containing "Yes" or "No".
When this field is set to "No", customers using ActiveWeb have the option to print their own box and file labels (with file level web licence). This is typically set to 'Yes' when the record center issues pre-printed labels for the customer.

Hide box sale
When this field is set to "Yes", the box sale section will not appear on ActiveWeb for this customer. This is typically used when customers are to order boxes as line items.

Hide alternate labels on web
When this option is set to "Yes", customers will not be able to see or modify alternate barcode label information on ActiveWeb.

User field 1 on delivery slips
When set to "Yes", Field 1 for both boxes and files will be included in their description on delivery slips and on return slips. This also applies to disposal lists.

Lock list items
When this field is set to "No", items placed on a work list in ActiveWeb can still be ordered and modified, since work lists may be created well in advance. When it is set to "Yes", they cannot.

Fixed disposal by default
When *No*, the item disposal date defaults to variable (ie. calculated based on the document type retention policy). When *Yes*, the disposal type defaults to fixed date, with a default value of December 30, 3999 to make it easy to identify disposal dates that have not been user modified.

Relax add to list check

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When this field is set to *Yes*, a customer's boxes can be added to a destruction list even if the destruction type for this box does not match. (E.g. a box with 'non-confidential destruction' can be put on a list with 'confidential destruction.) Destruction is billed according to the type of the list.

Email delivery slip
Check box. If selected, the delivery slip will be sent by e-mail to an address entered in the text-field to the right when a delivery is created or a rush order is picked and closed. An e-mail is also sent to the authorized user who placed the order if an email address specified in the *Authorized User* module. This e-mail is specific to the order and includes the order number, a list of items on the order, the delivery address, time, and date, and if any items are excluded the reasons given.

If the same e-mail address is used for the authorized user and for the main delivery slip, only one copy of the main delivery slip will be sent.

Email return slip
Check box that, if selected, will cause the return slip to be sent by e-mail to an address entered in the text-field to the right. If there are no items on a return, no return slip will be sent.

***Accession**
Department
Drop-down field associated to a list defined in the *Department* module.
This field allows to select the default department for new boxes added to the inventory with a PDT 142 .

Document Type
Drop-down field associated to a list defined in the *Retention Schedule* module.
This field allows to select the default document type for new boxes added to the inventory with a PDT 142.

Pick up
Morning picking time/Afternoon picking time
These fields specify the customer-specific cut-off times for picking. If values are present, these will override the picking times specified in the System Information 203 module. (Try to avoid unnecessary exceptions, as they make your operations more complicated and less efficient.)

Regular orders accepted before these times will be picked for the following delivery cycle. Orders that miss the picking cut-off will fall into the subsequent delivery cycle.

Once a day option
Choice field containing "Use value in system information", "Same day", "Next day"
This applies when the delivery cycle in the Management->System Information 203 module is "Once a day", with the "Same day" box selected.

- When this option is **"Same day"**

- if the PM cut off is blank, the AM cut-off is used, and regular orders placed before that cut-off will be delivered that afternoon.
- if the PM cut off is specified (not blank), orders placed before this cut-off will be delivered the next day (in the afternoon)
- If both cut-off times are blank in the customer information, the system information cut-off times will be used.

- When the option is **"Next day"**,

- if the PM cut off is blank, the AM cut-off is used, and regular orders placed before that cut-off will

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be delivered the next day.
- if the PM cut off is specified (not blank), orders placed before this cut-off will be delivered in two days
- If both cut-off times are blank in the customer information, the system information cut-off times will be used.

Contact/Name/Telephone/Fax
Name and coordinates of the contact person for billing, purchasing, contracting or other.

***Mailing Labels**
This note, located beside the previous fields, indicates that the contact names are mailing label names for the customer.

Invoices
Print Detailed Invoice
Choice field containing "Yes" or "No".
When this field is set to "Yes", a detailed invoice is printed when producing invoices for this customer in the *Invoicing* module.

Print Delivery Summary
Choice field containing "Yes" or "No".
When this field is set to "Yes", the delivery summary for a customer is printed with his invoice.

Print Out Boxes List
Choice field containing "Yes" or "No".
When this field is set to "Yes", a list is printed with the invoice of the customer and indicates all the boxes that are still OUT.

Print Activity Report
Choice field containing "Yes" or "No".
When this field is set to "Yes", an activity report is printed with the invoice of the customer and indicates the activities of boxes and files for the billing period.

Print authorized users
When this field is set to "Yes", a list of active authorized users 277 is printed with the invoice of the customer.

Fast Orders

Default order user
Drop-down field associated to a list defined in the *Authorized Users* module.
This field allows to specify which user will be used by default for fast orders. His/her name will be displayed in the *Caller* field of the *Orders* module.

Recipient
This field allows to enter the default name of the person that will receive documents for fast orders.

Delivery Type
Drop-down field associated to a list defined in the *Delivery Type* module.
This field allows to specify which delivery type will be used for fast orders.

Delivery Address
Drop-down field associated to a list defined in the *Delivery Address* module.

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This field allows to enter a delivery address for fast orders.

Schedule

Override default schedule
Choice field containing "Yes" or "No".
When this field is set to "Yes", all the opened hours scheduled below are possible delivery hours for the customer, even if these hours are not similar to the regular business hours set for the record center in the *System Information* module. The record center business hours are overridden and on related delivery slips, the system displays the delivery date and time requested by the customer.

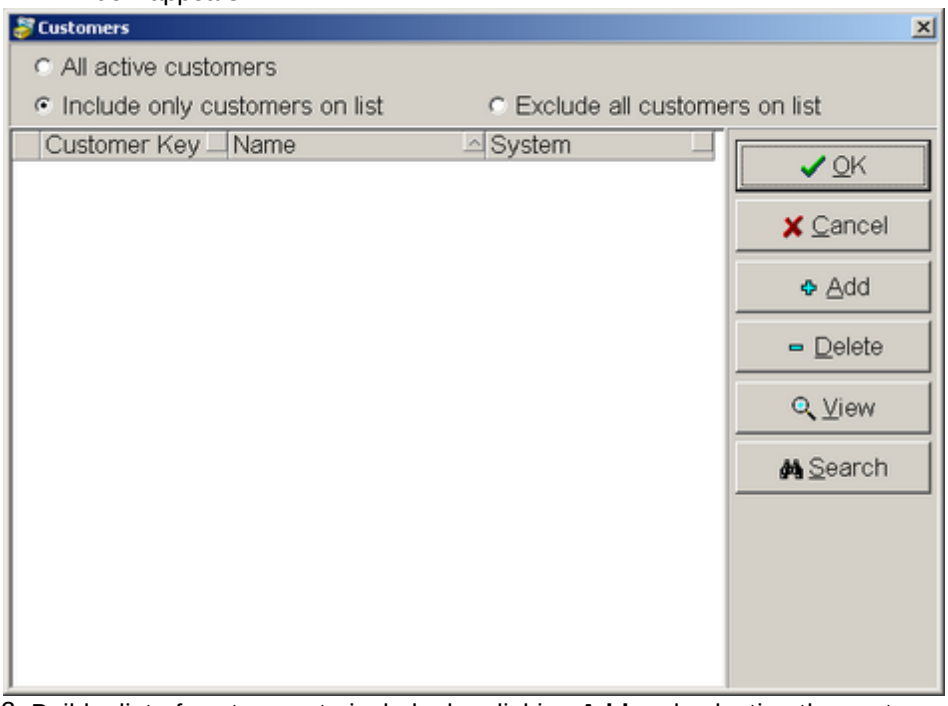
Deliver during record center holidays
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer can place and receive orders for every desired day during the year, even on record center's holidays.

Delivery/Opened/Start/End
These fields allow to schedule possible delivery hours on Monday, Tuesday, Wednesday, Thursday, Friday, Saturday and Sunday for the customer. These are the delivery hours taken into account when the *Override default schedule* field (above) is set to "Yes".

6.3.2.3 Export Customer's email addresses

If you need to have a list of email addresses from your customers, here's how you proceed:

1. From the **Customer->Customer Information** module, go to **File -> Export Email Addresses**. A window appears.



2. Build a list of customers to include, by clicking **Add** and selecting the customers, or Clicking the **Search** button.

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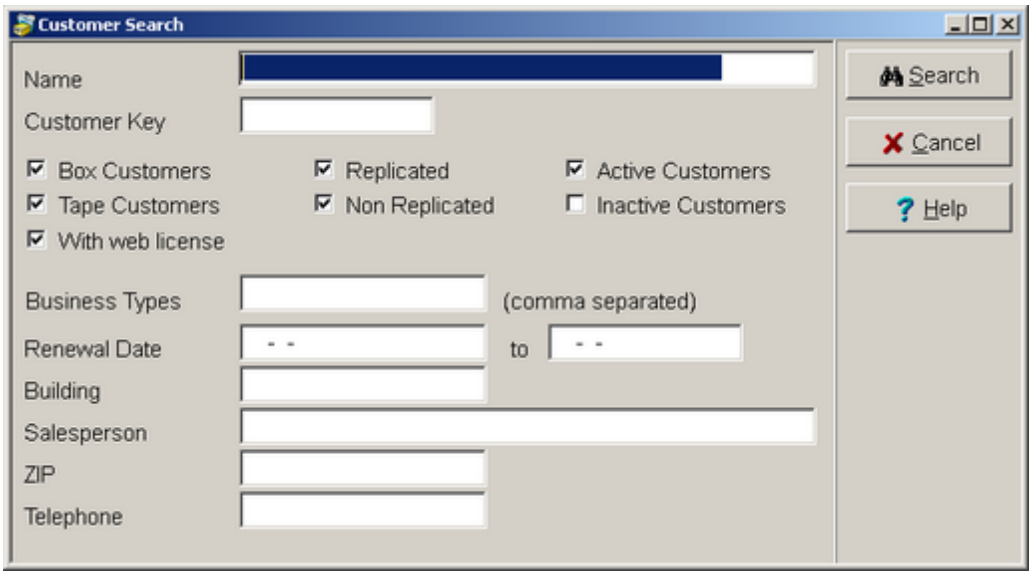
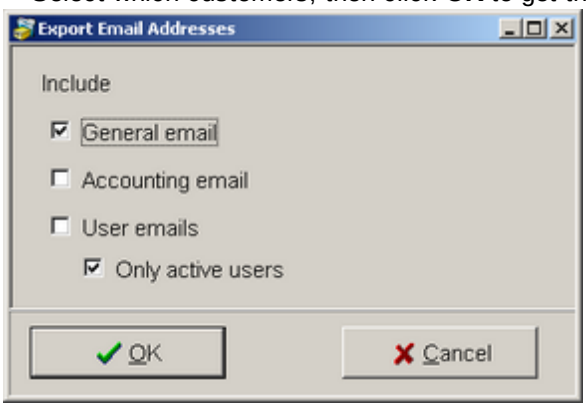
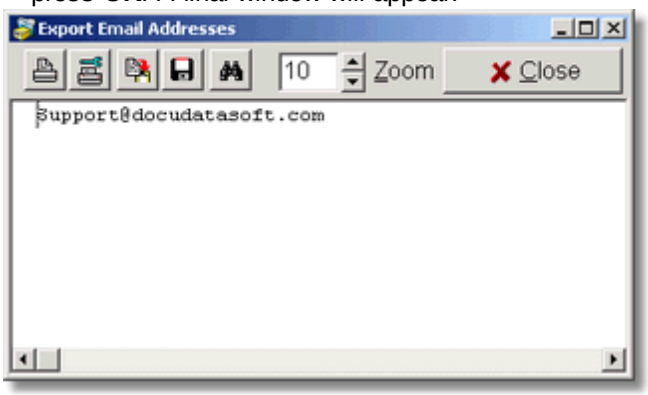


3. Select which customers, then click **OK** to get the following screen:



4. Chose to include some or all of General, Accounting and User (Authorized Users) emails, then press **OK**. A final window will appear:



5. The selected e-mails can now be saved as a text file or printed (using the buttons), or copied and pasted from the window.

6.3.2.4 Printing mailing labels for one or more customers

To print mailing labels for one or more customers using a pre-defined label format and the name and address information from the customer information, do the following:

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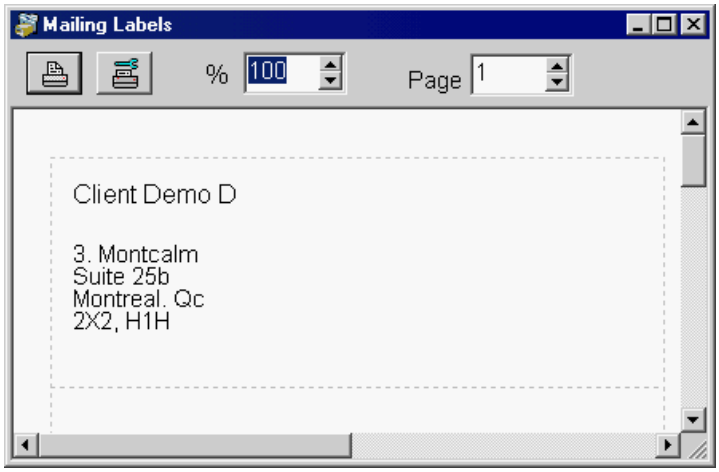
1. Click on **Customer->Customer Information** from the *Main window*.
2. Click on **File->Mailing Labels**. A window appears.

3. Check the desired option and press **OK**. Labels are displayed.



4. Click on the **Print** button, then the **Close** button when finished. The labels are automatically printed from the default printer.

6.3.2.5 Send batch emails

1. Open the **Customer->Customer Information** module and from the menu select **File->Send Batch Emails**. A window appears.

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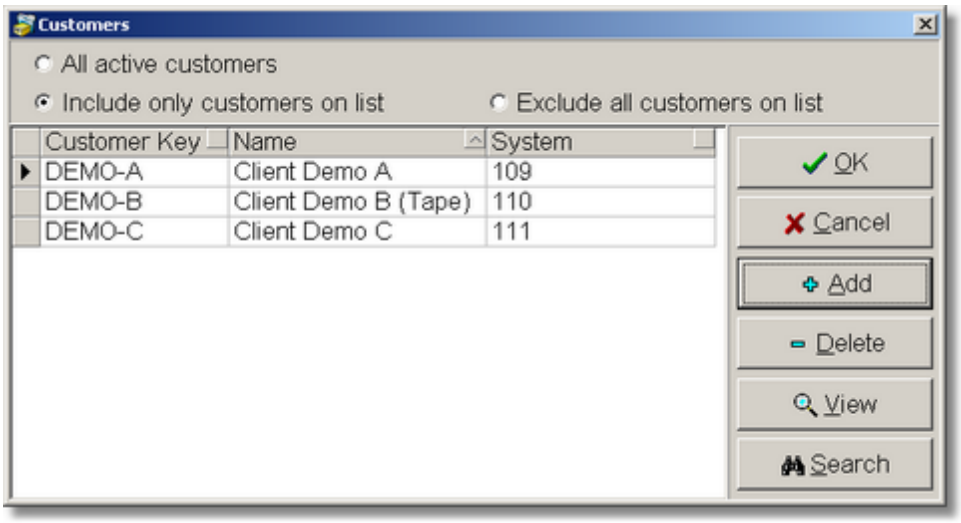
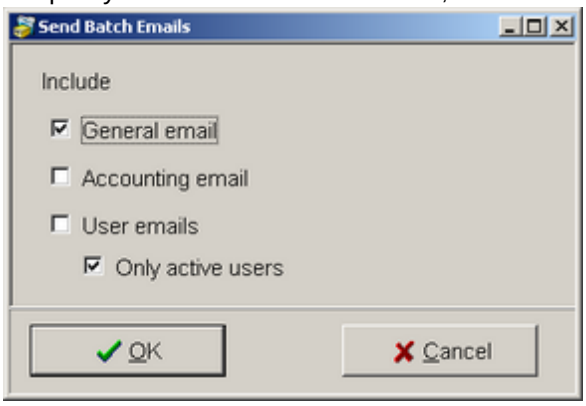


2. Specify which customers to include, then click **Ok**. A window appears



3. Specify which type of emails to use for the customer. General emails are specified in the *Customer Information* module. Accounting e-mails are specified in the *Customer Information* module, and also in the *Accounting->Departmental Invoice* module for customers with departmental invoices. User emails are found in the *Customer->Authorized User* module. Selecting the "Only active users" box will cause the e-mail addresses of authorized users who are no longer active to be omitted.
4. Click **Ok**. You will be prompted to enter the subject and text of an e-mail.

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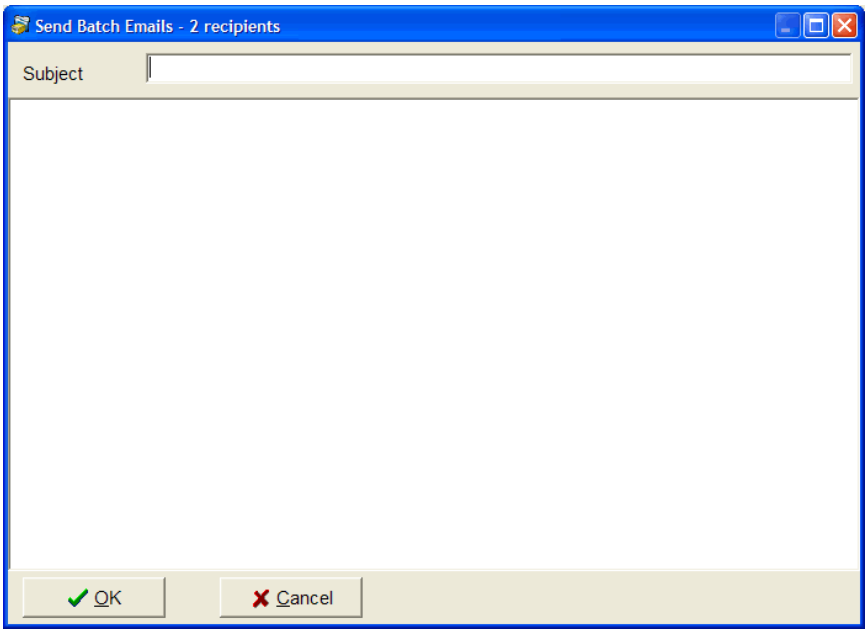
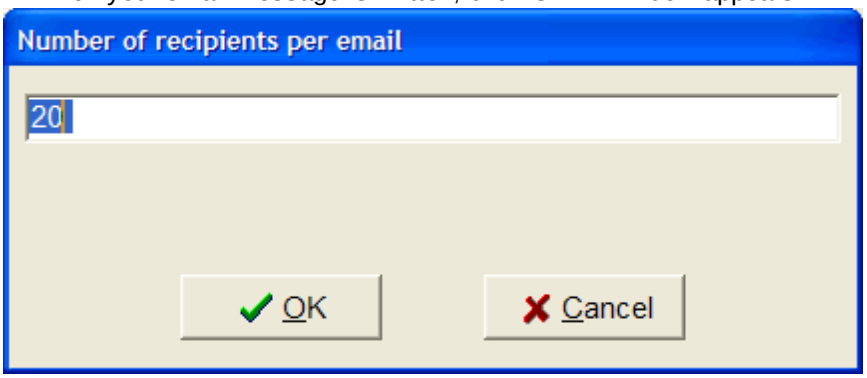
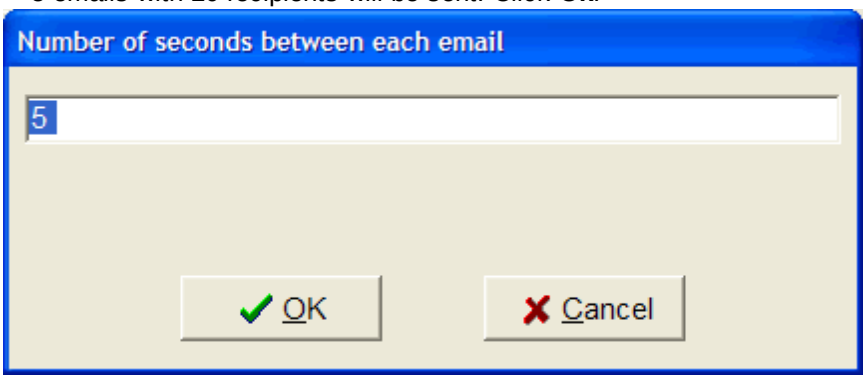


5. When your email message is written, click **OK**. A window appears.



6. Enter the maximum number of recipients per e-mail batch. This may be limited by your e-mail service provider for protection against spamming. If you enter 20 recipients and are sending 100, 5 emails with 20 recipients will be sent. Click **Ok**.



7. Enter the number of seconds between emails and click **Ok**. The default of 5 seconds should work. If not, consult your IT administrator or service provider.
8. If the emails were sent, you will return to the "Customer Information" screen.

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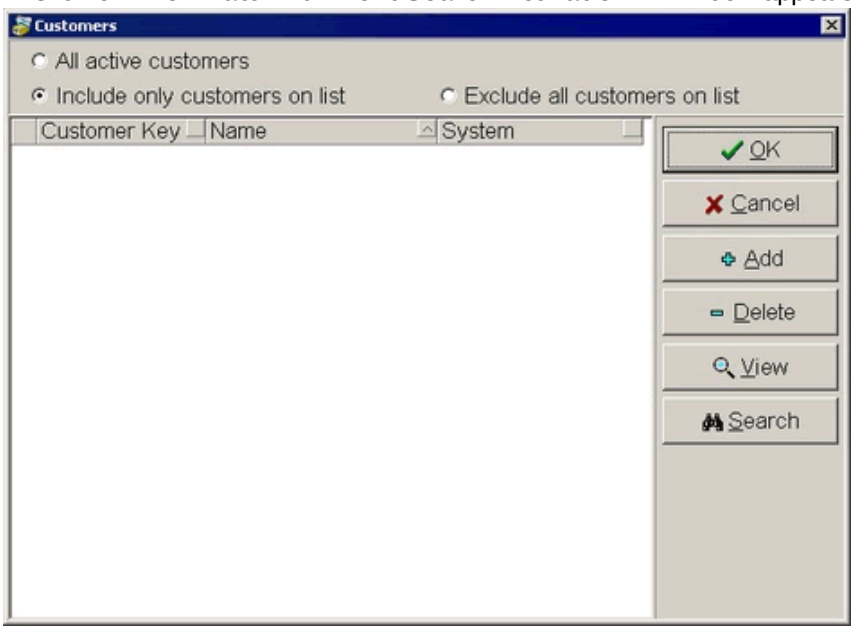
9. If you get the following window, the e-mails were not sent. Have your system administrator verify that your SMTP server is working and is properly configured in the *Management->System Information* 205 module.

6.3.2.6 Activating multiple clients to use the Full Text Search

This operation activates the Full Text Search option for many customers simultaneously. This will index text fields, enabling advanced searches on ActiveWeb and at the record center.

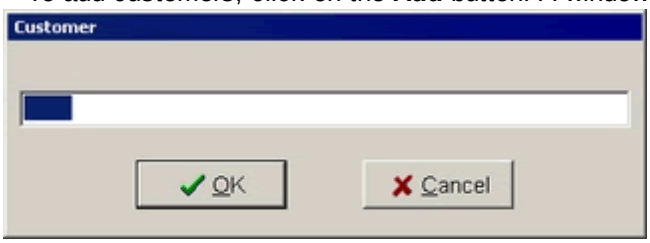
1. Click on **Customer->Customer Information** from the *Main window*.
2. Click on **File->Batch Full Text Search Activation**. A window appears.



3. Select the *All active customers* option, or select another option and build a list of customers to include or exclude.

To edit the list of customers (when it applies):

- To add customers, click on the **Add** button. A window appears:



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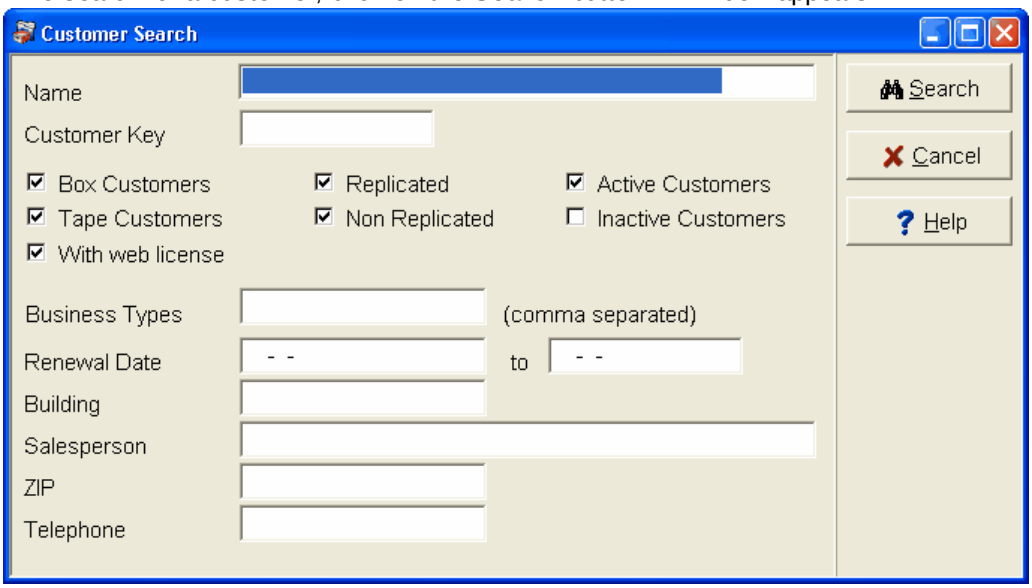
- Enter the customer key and press **OK,** or press **OK** to have the list of customers. The customer selected will automatically be added to the list.

- To search for a customer, click on the **Search** button. A window appears.



- Search which customers by entering information or by checking one or many boxes, then click on the **Search** button. All the clients corresponding to the previously entered description will automatically be added to the list.

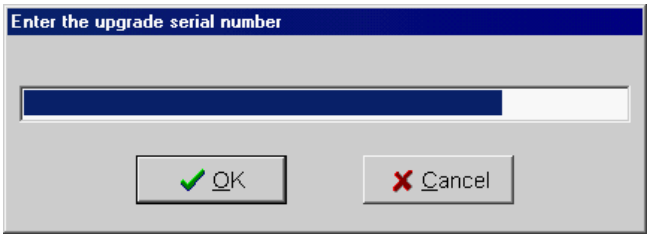
- To delete a customer from the list, select it (it will appear highlighted) and press the **Delete** button.
- To view the information of a client on the list, select it (it will appear highlighted) and press the **View** button.

4. When all the modifications have been made to the list, press **OK**.

6.3.2.7 Adding customer accounts

Each customer has a unique system number that is not duplicated in any other record center using **EDC** worldwide. You have been allocated a batch of customer numbers. When you require additional accounts, contact DocuData for an upgrade serial number, then do the following:

1. Click on **Customer->Customer Information** from the *Main window*.
2. Click on **File->Add Customer Accounts**. A window appears.



3. Enter the upgrade serial number and click **OK**. More system numbers will now be available for creating new accounts 252.

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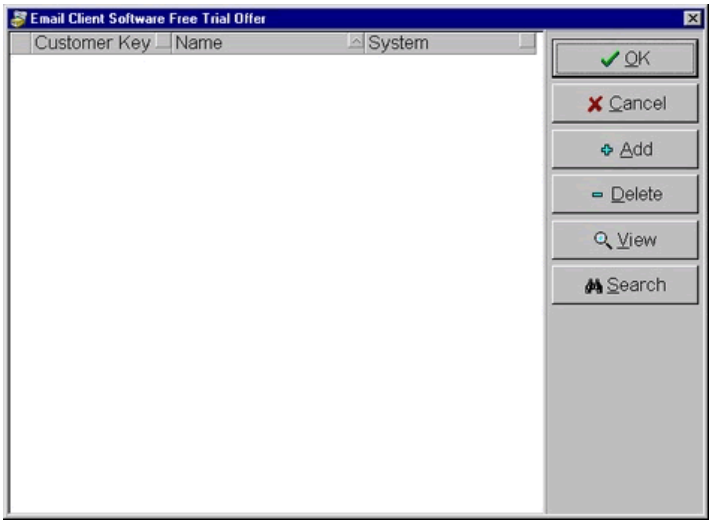
6.3.2.8 Email Client Software Free trial Offer

EDC ActiveFile helps your customer to integrate the management of their active files with their semi-active files at your record center. This may help them achieve greater time and space efficiency by sending more of their less active records to your facility.

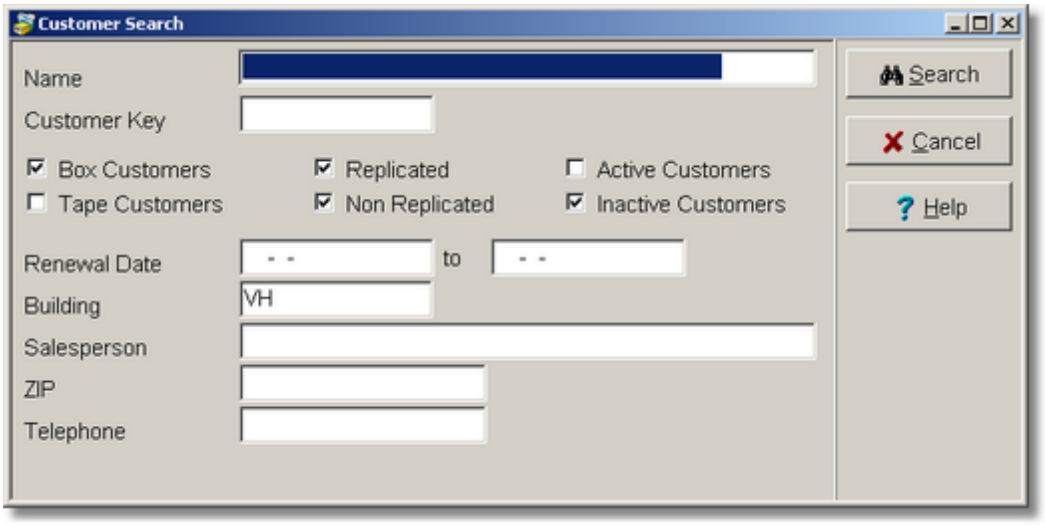
This function helps you to set your clients up with a free trial installation of EDC ActiveFile software.

1. From the **Customer->Customer Information** module menus, select **File->Email Client Software Free trial Offer**. A window appears.



2. List the customers to contact with the offer

- To add by customer key, click **Add** button.
- Enter the customer key and press the **Enter** key.
- If the text entered does not completely match a key, a list of customers will appear, positioned closest to the text you have entered. Highlight one or several customers then click **Okay**.
- To add a customer using a search, click the **Search** button. A window appears.



- Enter parameters and click **Search**. All results meeting all criteria will automatically be added to

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the list, with the exception of customers who may already be using the ActiveFile software.
- To remove customers from the list, highlight them and click the **Delete** button.
- To view the details of a customer, select the customer and press on the **View** button. The customer details will appear in another window.

3. When the list is final, press **OK**. A report will appear.

Note: This function requires that EDC be set up to send e-mail (System Information module, under the SMTP section), and that the customer have a valid e-mail in the Customer->Customer Information module.
password 252 assigned. +++????

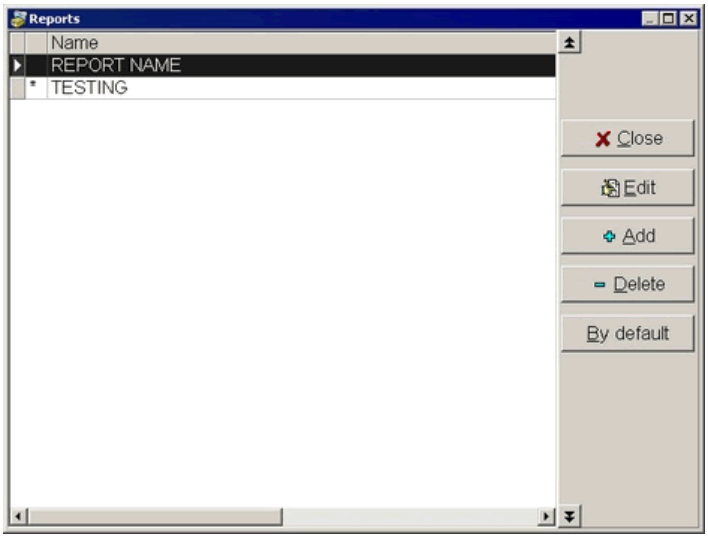
6.3.2.9 Preparing an EDC ActiveFile installation

EDC ActiveFile helps you to offer comprehensive data management services to your customers, integrating their management of physical and electronic documents, whether these documents reside at their office or in your record center. Please contact DocuData support (Support@docudatasoft.com) for help with setting up a new customer to use ActiveFile.

6.3.2.10 Exporting boxes and files to CSV format

This is used to export all the boxes' information to a CSV file. This a report of all the boxes from one customer that can be opened using excel or any other program that supports the CSV format.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **File**-> **Export boxes | Export Files**
3 A confirmation message appears. Press *Yes* if you want to continue with the operation, *No* or *Cancel* to abort the operation.
4 A window appears, containing the different reports 271 defined for this customer.



Note : If you wish a report to be used by default in all operations, select the report you want and press on the **By Default** button. The reports available in this list can also be modified for this operation, simply select a report template and click on the **Edit** button. One can then change the order of apparition of the fields and change the content of the export. There is also the possibility of adding a report template or deleting one.

5 Select the wanted report template (it will appear highlighted) and press the **Close** button. A

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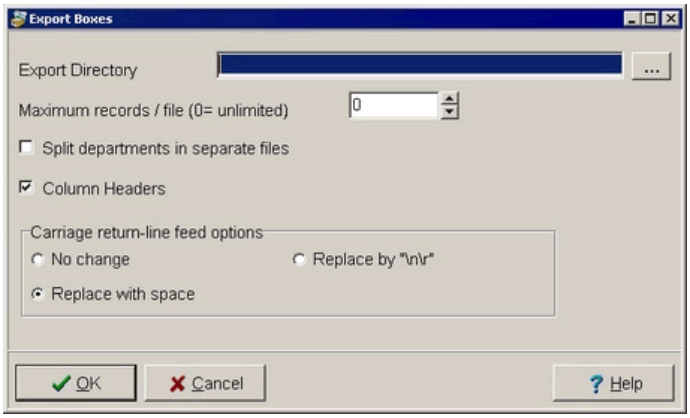
window appears.



6 Select the desired options and enter the correct information in the fields.

Export Directory: You can browse through the different directories by clicking on the browse button. The files that will be created will be added to the directory you selected.
Maximum records / file (0=unlimited): This allows you to enter the number of files or records that will fit in your file. This is useful when working with excel, because excel spreadsheets have a maximum amount of records that needs to be respected (eg. 65,536). If the value "0" is left as default, the number of lines in the file will be unlimited.
Split departments in separate files: This allows you to separate departments in different files. It can save you time, especially if departments are not allowed to see the inventory of other departments.
Column Headers: Column headers will specify the data that is contained in each column. They will appear at the beginning of each department.
Carriage return-line feed options: This option is specifically for the notes, it indicates what the export will do when exporting notes that have multiple lines.

- No change - no changes will be made to the note format.
- Replace with space - every time notes have more than one line, the carriage return will be replaced by a space.
- Replace with "\n\r" - every time notes have more than one line, the carriage return will be replaced by "new line/carriage return" characters. This ensures that notes will remain on a single line during the export. Please take note that some programs may not understand these characters.

7 When you have verified all the information, press **OK**. The exportation of the boxes|files will be done automatically.

6.3.2.11 Exporting multiple images

EDC RC permits batch export of a customer's images in TIFF or PDF formats.

1. Click on **Customer->Customer Information** from the *Main window*.
2. Navigate to the customer for whom the images are to be exported

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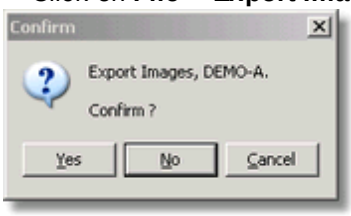
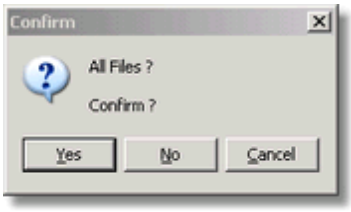
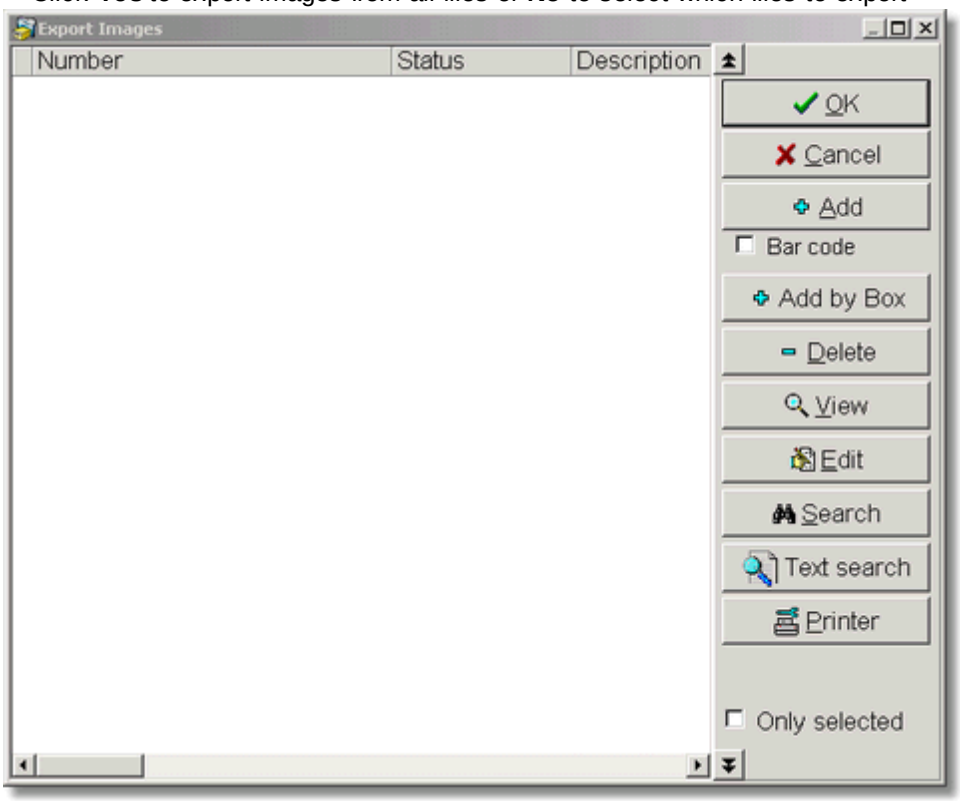
3. Click on **File-> Export Images**



4. Click **Yes** to confirm that export is for the correct customer



5. Click **Yes** to export images from all files or **No** to select which files to export



6. Create a list of files to export images from (see **Box and File searches** 356), then click **Okay**.

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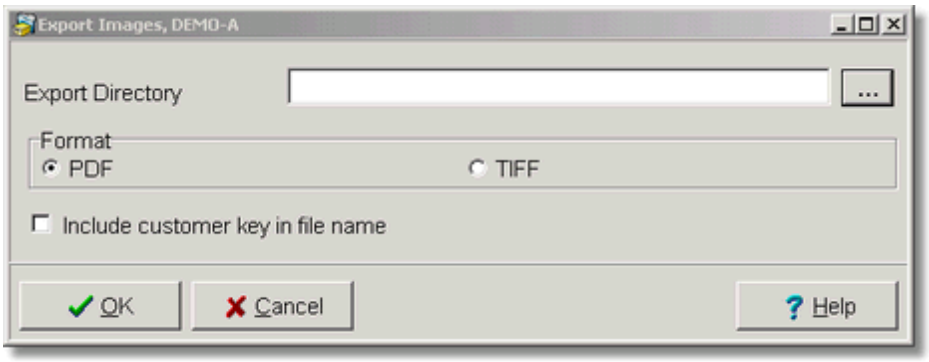

7. Select a location to export the images to, the image format, and whether to include the customer key in the file name, then click **Okay**.

Exported images are named with the file RC number. For example, file RC# 233506 belonging to the customer with key 'demo-d' would be 0000233506.PDF or DEMO-D_0000233506.PDF

6.3.2.12 Viewing the password of a customer

This password is used in setting up a customer with EDC ActiveFile.

1. Click on **Customer->Customer Information** from the *Main window*.
2. Click on **View->Password**.
3. A message appears:

4. Press **OK** to go back in the module.

6.3.2.13 Viewing the web license details of a customer

1. In the **Customer->Customer Information** module, from the menu select **View->License**.
2. A report is created with the number of users, the expiration date and the number of remote users of the client.

6.3.2.14 Adding a new customer

The preferred way of adding a new customer is to base it on a typical or template customer contract using the copy and add function 252.

Using the **Customer->Customer Information** module's **Edit->Add** function creates a new customer account using default values defined in the system information module. Customer pricing will not be copied, and you will also have to manually assign delivery types, user groups, customer reports, and many other parameters.

6.3.2.15 Copying a customer account

To keep your accounts manageable, it is good practice to have one or a few standard contracts that others are based on. Similarly, we strongly recommend having *template* accounts based on typical customers, and then copying and modifying these as necessary for new customer accounts.

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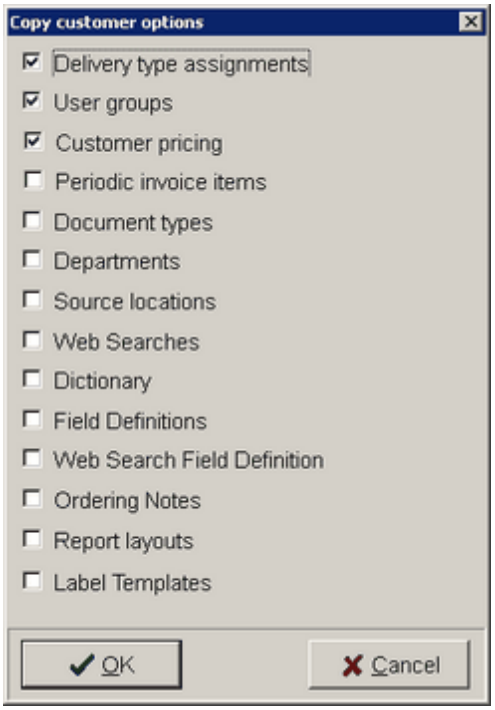
1. Open the **Customer->Customer Information** module.
2. Navigate to the customer you wish to make a copy from.
3. From the menu, select **Edit->Copy and Add**. The following screen appears:



Options for copying:

- **Delivery type assignments:** These will be similar for most customers, though you may for example need to add more urgent and after-hours rush delivery types for nearby lawyers offices, or remove rush delivery for distant customers.
- **User groups:** Copy this. Your template customer will likely include a supervisor user, and perhaps more restrictive groups with less access to data and delivery types.
- **Customer pricing:** Will copy any customer-specific overrides of general pricing. If no customer pricing has been created, nothing will be copied.
- **Periodic invoice items:** If your template customer has a recurring charge such as 2 imaging web license, this can be a valuable option to copy.
- **Document types, Departments:** Pre-add boxes are often created with the document type "Select Type" and the department "Select Department", to prompt users to assign these to their actual departments on ActiveWeb. It is useful to copy these from the template customer.
- **Other options:** Various options that affect the customer's experience on ActiveWeb can be copied as appropriate.

4. Click **OK** to continue. A message pops up, verifying that you are copying from the correct customer

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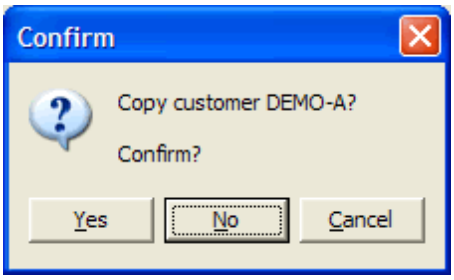
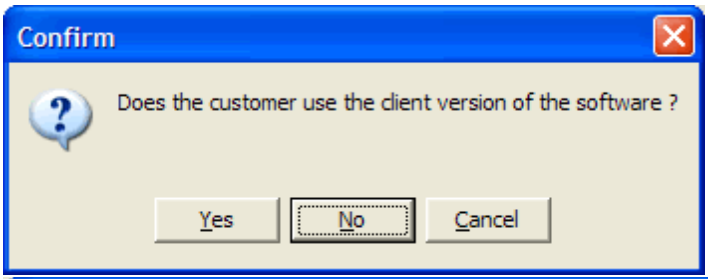
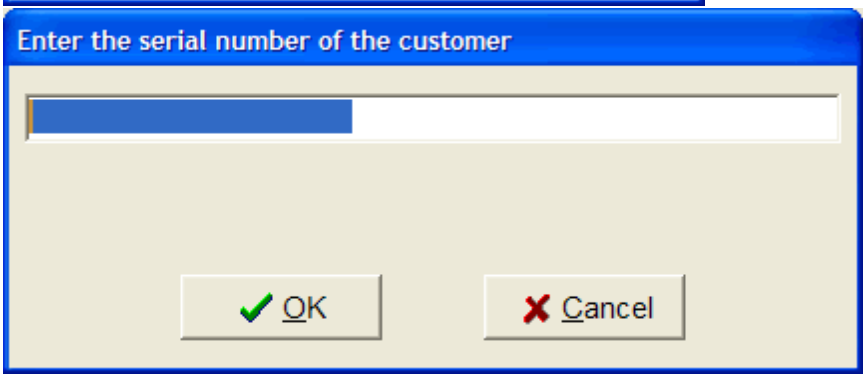
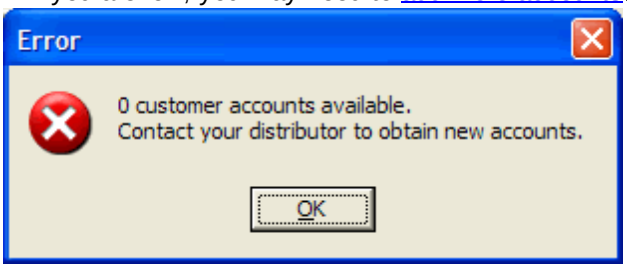


5. Press **Yes** to create the new customer or **No** to cancel the copy.





6. If the customer uses **EDC ActiveFile**, click **Yes** and enter their system number which can be viewed in the **System Information** module of *ActiveFile*.) Otherwise, click **No**.
7. If you are low, you may need to add more accounts 247.



8. Once the copy is done you will be able to enter the information for your customer:

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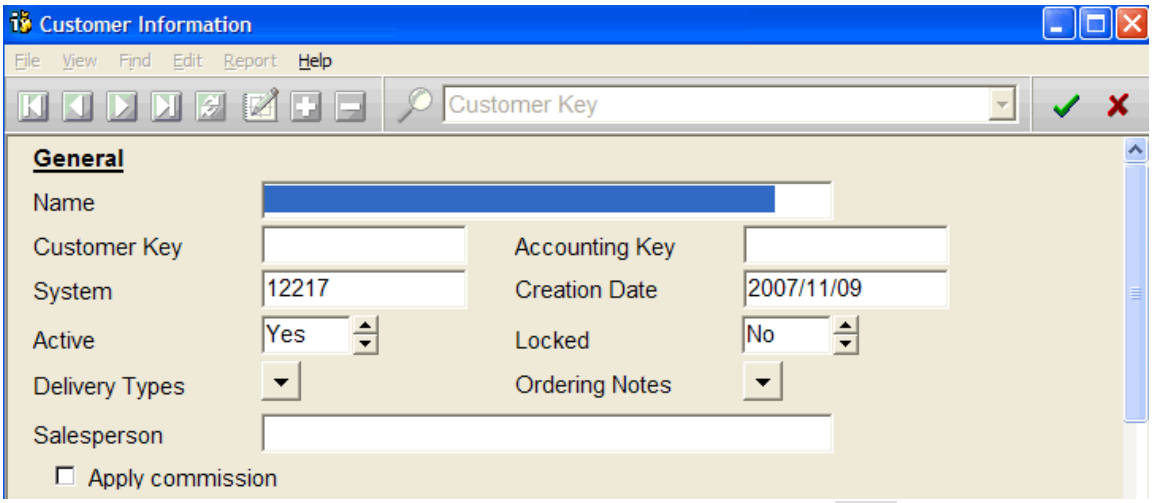

9. When you are done with the data entry just press the **accept button** to create your new customer.
10. Continue setting up the customer for billing 86.

Your operations manual should list which fields to review when creating a new account. However, here are some of the **commonly altered options:**

- Address information, including mailing and billing e-mail addresses
- Business
- Taxable (for charities and non-profit)
- Invoice format
- File in box tracking
- Automatic Box | File number
- E-mail delivery | return slip (and e-mail address)

6.3.2.16 Generating new web licenses and editing existing web licenses

Web licenses need to be created for clients that wish to use ActiveWeb, have access to the Imaging delivery type, or use the Rotation Schedule module (primarily for tape rotations).

Generating a new web license

1. Open the **Customer->Customer Information** module.
2. Click on **Edit -> Generate Web License**. A window appears.

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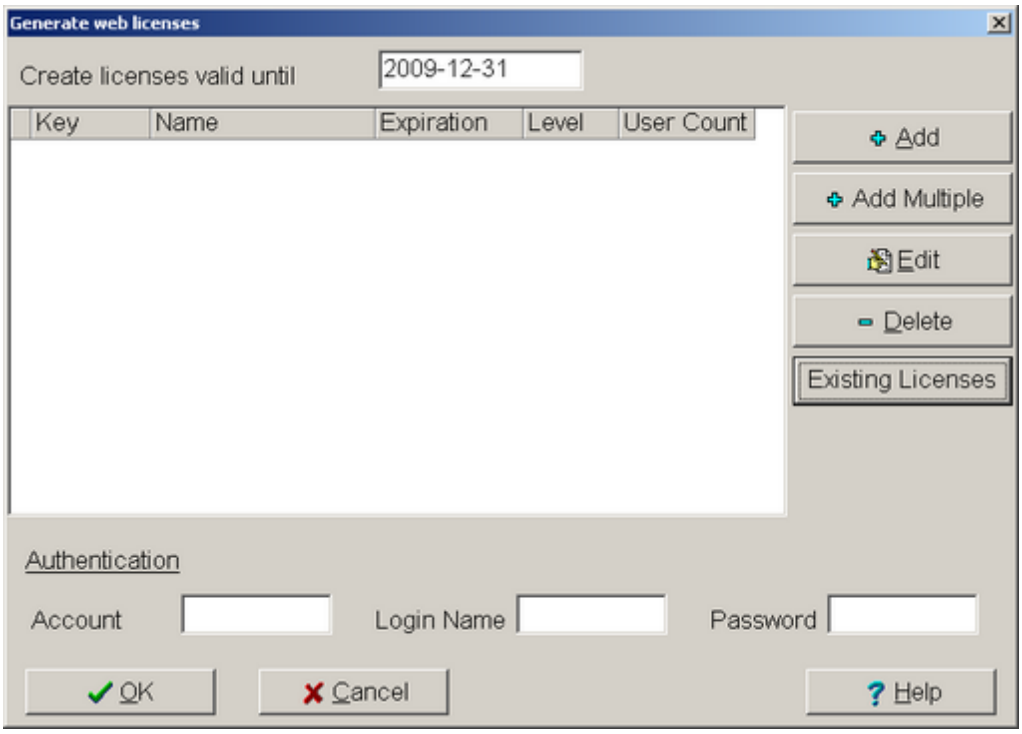
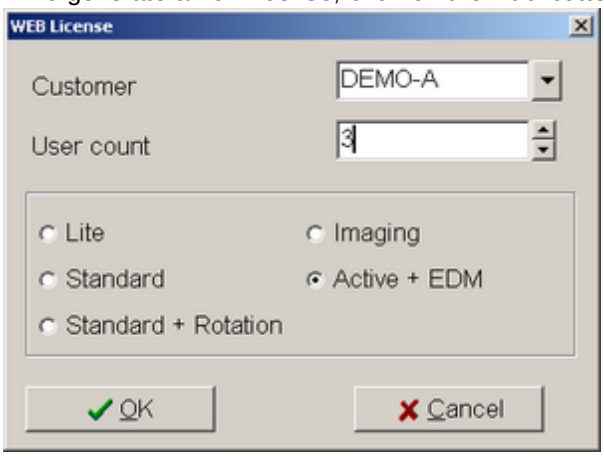


3. Enter a date in the "*Create licenses valid until*" field.
4. Fill in the DocuData *Account* key, *Login name*, and *Password* of someone authorized to generate web license.
5. To generate a new license, click on the **Add** button. A window appears.



6. Enter the customer code in the "*Customer*" field or click on the drop down button to have the list of customers (highlight a customer and press **OK**).
7. Enter the number of users that can access the web at the same time for the customer.
8. Select the type of license for your customer.
9. Press **OK**.

Notes:

- The license is normally billed by number of users.
- Selecting one or more licenses and clicking the **Delete** button removes the licenses from the list to be updated. It does not delete an existing license. You can delete a license by setting the

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expiry date or +++

Editing existing licenses

1. As above, open the **Customer->Customer Information** module.
2. Click on **Edit->Generate Web License**.
3. Click on the Existing Licenses button. A window appears, prompting, "*For one specific client?*".
4. Click **Yes** to select and edit the existing license of one specific client, or **No** to list existing licenses for all clients. This will create a list with one or multiple licenses.
5. To remove licenses from the list, highlight them and press the **Delete** button.
6. To edit one of the licenses, highlight it and press the **Edit** button.
7. Perform the necessary changes and press **OK**.

WARNING: All the licenses that appear in the window will be updated at the same time, so one needs to be careful when performing changes.

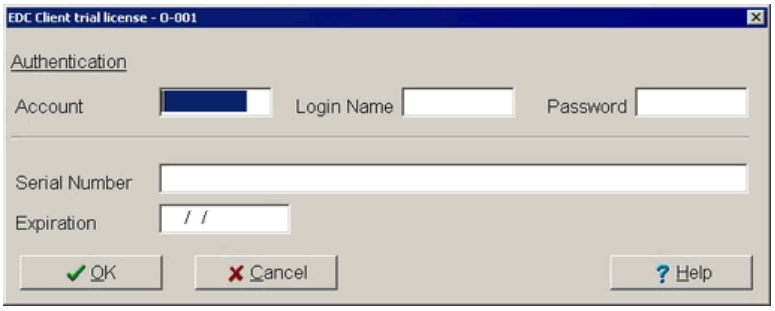
Web license levels:

- **Lite:** Basic license allows the ordering and inventorying of boxes and files but not management features
- **Standard:** Include box and file plus management features.
- **Standard + Rotation:** Includes the standard features plus the ability to schedule tape rotations.
- **Imaging:** Adds the ability to view and manage images online.
- **Active + EDM:** Includes all ActiveWeb features, such as the management of active files and electronic documents.

6.3.2.17 Adding an EDC ActiveFile trial license

EDC ActiveFile licenses have to be created when a customer wants to have EDC ActiveFile installed.

1. Open the **Customer->Customer Information** module
2. Navigate to the the desired customer
3. From the menu, select **Edit ->EDC ActiveFile Trial License**. A window appears.



4. Enter your credentials in the *Authentication* fields, then press the **OK** button.
5. The software will contact DocuData and generate a serial number and an expiration date for that customer.

6.3.2.18 Editing the quantity of remote licences for a customer

Record Center / On line (Cust32.exe) is an application included with EDC RC that can be used by customers to access and modify information related to their records. It is used on the record center network, typically from within a consultation room made available to customers for indexing their boxes and preparing for auditors. (Note that it has less functionality than ActiveWeb.)

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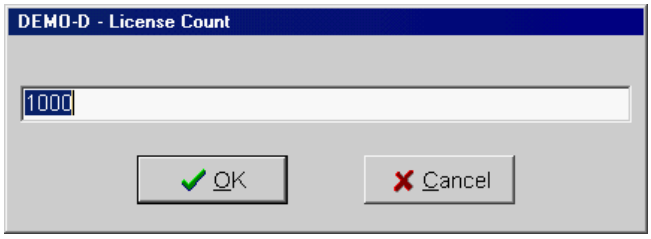
The following procedure allows you to modify the number of users authorized to access this application concurrently for a given customer

1. Open the **Customer->Customer Information** module.
2. From the menu select **Edit->Remote access license**. A window appears.



3. Enter the wanted quantity of licenses and press **OK**.

6.3.2.19 Editing a web license

Note: The standard method for managing web licenses for client access to ActiveWeb is to use the Generate a web license 255 function. However, if your server is unable to connect with DocuData's server, it is possible to enter the license manually as follows:

1. Send DocuData Software Corporation the following information:
- The customer name and number (**Customer Information** Module) ;
- The options that the license requires.

2. Open the **Customer->Customer Information** module and select **Edit->Web License**
3. Enter the license number and press **OK**.

6.3.2.20 Defining the box and file fields

EDC enables you to tailor ActiveWeb to meet your customers needs. You may customize the names of fields for each customer, and if you have already customized the field names for a customer in a given industry, it is possible to copy their field definitions to other customers 261.

Overview of customizations possible with box and file fields:

- Changes in the names and order of fields made here will be seen by the customer on ActiveWeb.
- *Required* fields are labeled in red. The customer cannot proceed if the field is blank.
- *Disabled* fields are not displayed on ActiveWeb.
- A drop-down list of values can be created for fields

Open the field definitions box:

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **Edit->Field definition -> Box | File**. A window appears.

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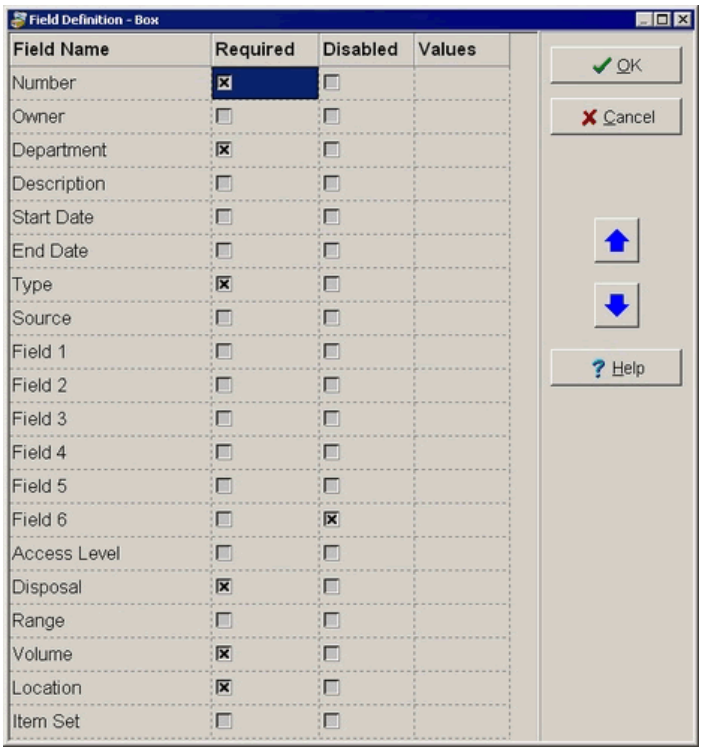
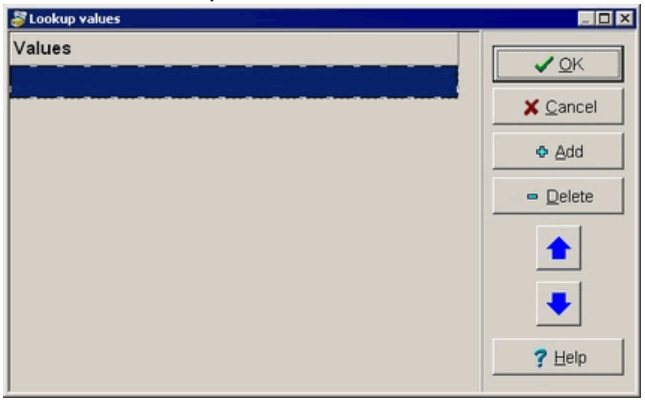


To set fields as required
- check the *Required* check box beside the field.

To disable fields
- check the *Disabled* check box beside the field.

To set values in the drop down list for Field 1, 2 or 3
- Click on the drop down arrow of the *Value* field. A window appears.



- To add a value to the list, press the **Add** button. Double-click on the field and enter the desired characters.
- To delete a value from the list, select the desired field (it will appear highlighted) and press the **Delete** button.
- To change the order of the values, select the desired value and press the **up** or **down** arrows.
- When all the changes have been performed, press **OK**.

To change the position of the field,

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- Click the field name to select it.
- Press the **up** or **down** arrow until the fields is in the desired position.

To rename a field

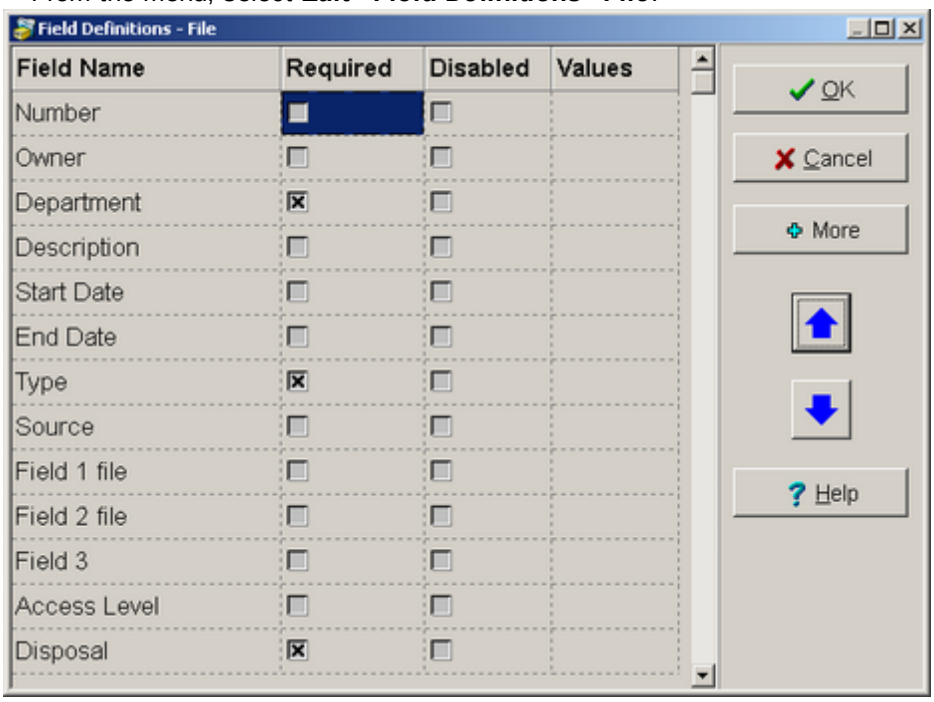
- Double-click the field name to be changed, and enter the new one. (Note that this changes the value stored in the customer dictionary 190 in the current language.)

When all the values have been entered and all the fields have been set, press **OK**.

Additional file fields:

In addition to the fields normally visible through file module, it is possible to make additional longer metadata fields available for files.

1. Open the **Customer->Customer Information** module and navigate to the correct customer.
2. From the menu, select **Edit->Field Definitions->File**.



3. Click the **More** button. When done for the first time for a give customer, this will activate the extra fields. A window will appear:

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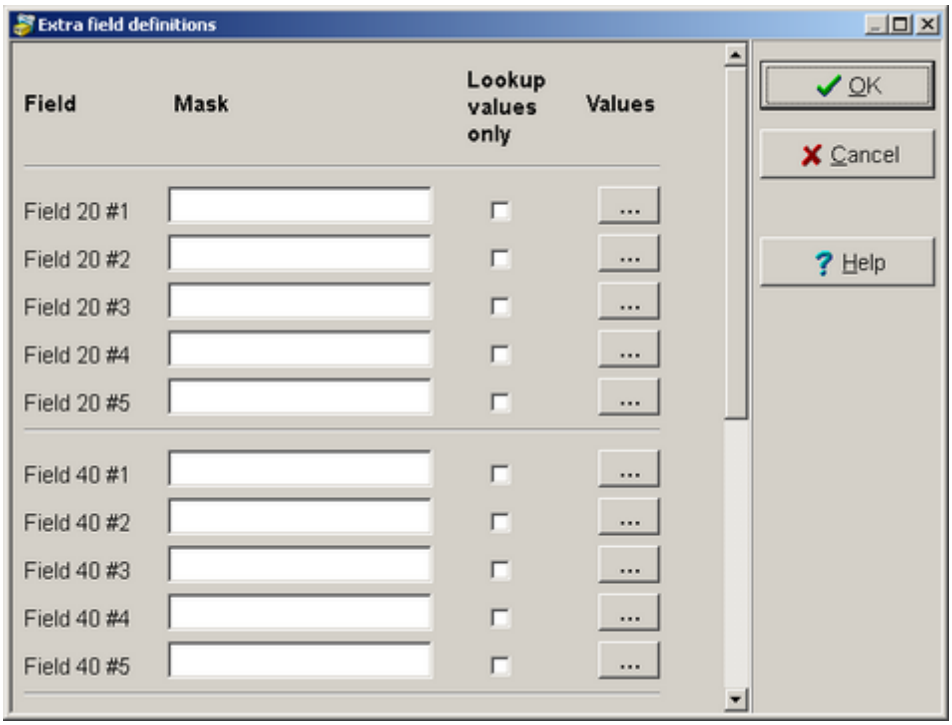


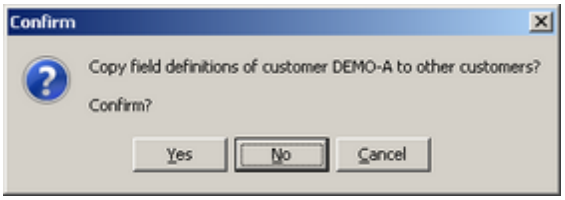
- If you require a specific formatting for a field, enter a mask (eg "(999) 999-9999" for north american phone numbers), enter mask criteria730. Otherwise, leave this field blank.
- Click the '**...**' button associated with the field if you wish to enter look-up values for a drop-down list.
- Check the **"look-up values only"** box if this applies

4. Click "**OK**" to return to the previous *field definitions* window when done
5. Fields 20#1 Through 80#5 will now appear in the list, and may be enabled, renamed, and re-ordered as desired.
6. Click "**OK**" when done.

6.3.2.21 Copying field definitions or Web searches to one or more customers

Field definitions define the naming and behavior of fields for your customer on ActiveWeb. Web searches specify which searches are available to each customer.To copy these from one customer to others, you may do the following:

1. In the **Customer->Customer Information** module, navigate to the profile of the customer that you wish to copy from.
2. From the menu, select **Edit->Field definitions->Copy fields to other customers**. for field definitions or **Edit->Web Searches->Copy web search definitions to other customers**.
3. A dialogue window appears. Confirm that you are copying from the correct customer. Click **Yes** to continue.



4. A window appears.

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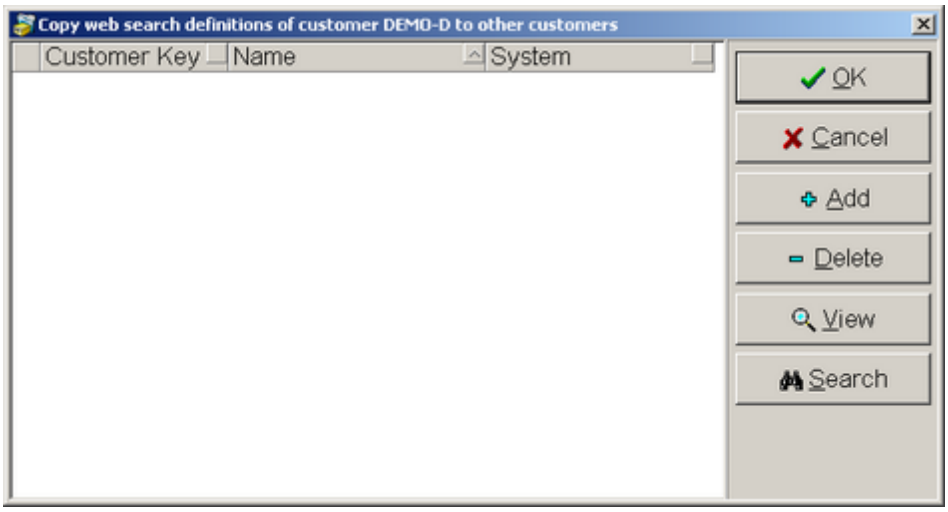
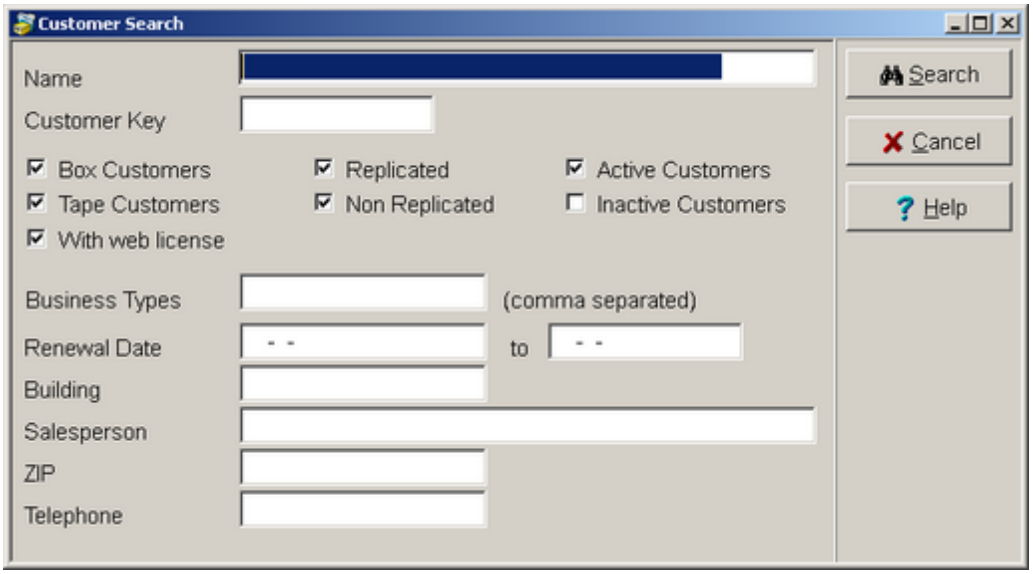


5. Build a list of customers to include, by clicking **Add** and selecting the customers, or Clicking the **Search** button.



6. Once you are satisfied with the list of customers that you have built, click **OK** to continue.

The definitions or searches will be copied to the selected customers.

6.3.2.22 Editing the web search parameters

These parameters will organize the customer's list of search parameters on the web if they have an Internet access to the record center (ActiveWeb). To see which report was set by default for the web search results see the Adding, configuring or deleting default or custom reports for a customer 271 topic.

1. Click on **Customer**->**Customer Information** from the *Main window*.
2. Click on **Edit->Web Searches->Web Searches**. A window appears.

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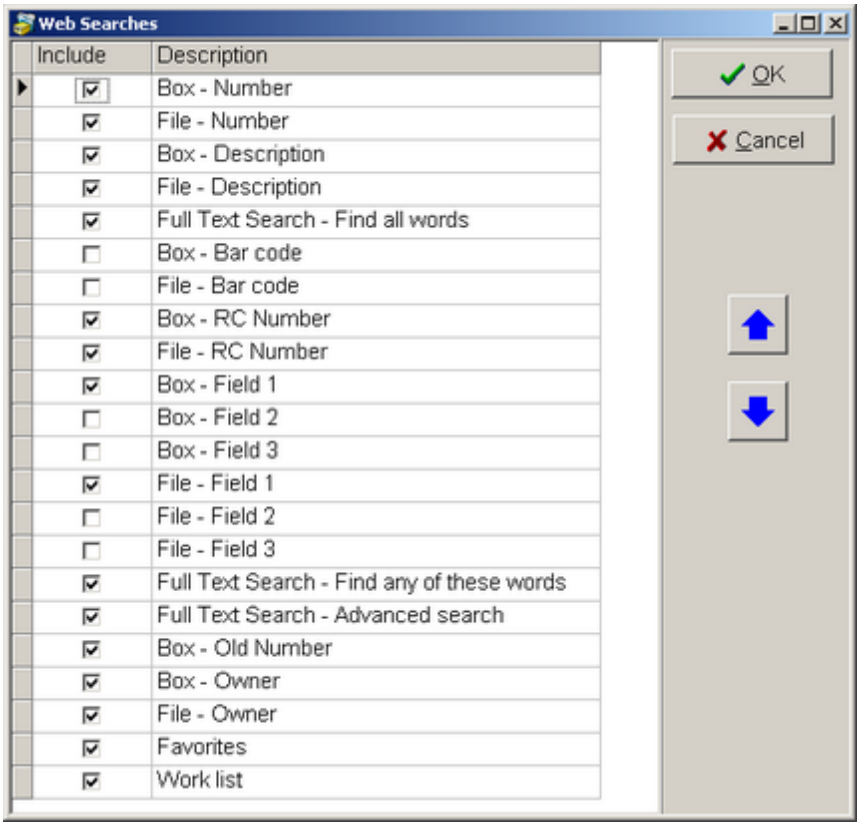

3 Edit the order or the content of the list :

- To exclude a specific field from the list, uncheck the *Include* check box situated beside the field description.
- To change the order of apparition of the different fields, select the field you want to move (an arrow situated at the left of the field indicates the selected field) and use the direction arrows at the right of the window to set the appropriate position.

4 When all the changes to the parameters have been done, press **OK**.

6.3.2.23 Edit web search field definitions

On ActiveWeb, the user can specify which fields appear in the search results report. These settings can also be viewed and edited in EDC RC as follows:

1. In the **Customer->Customer Information** module, from the menu select **Edit->Web Search Field Definition->Box | File | Document**. A window appears.

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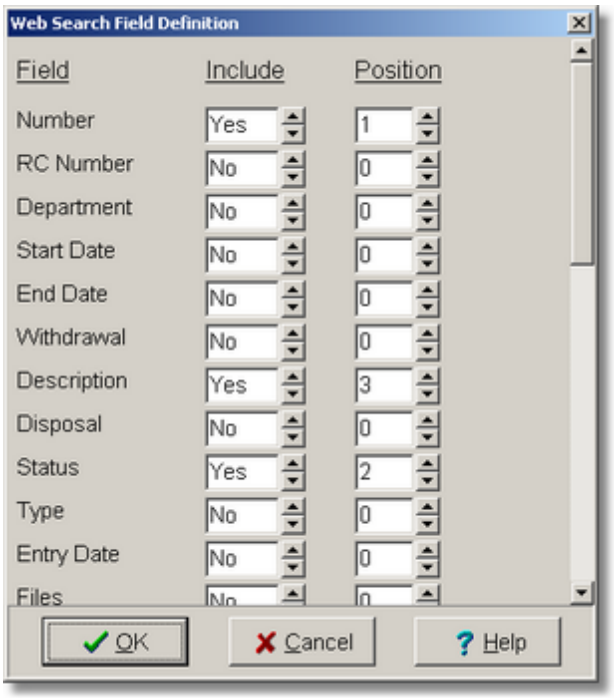
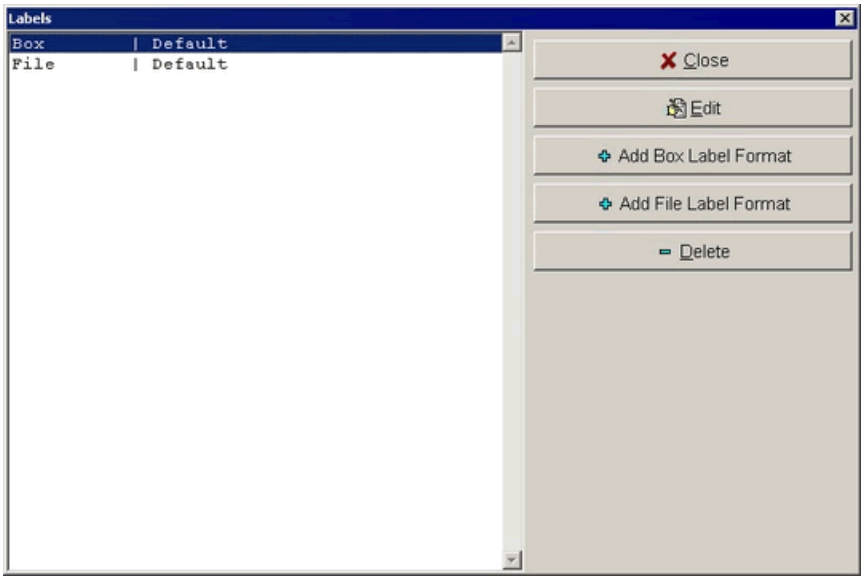


2. If you wish to include a field, set *Include* to *Yes*, and specify a position.
3. Click **Okay** to accept changes.

6.3.2.24 Customizing laser labels for a customer

This topic explains how to create label templates for each customer. The created templates will form a list that can be selected from when printing laser labels [328].

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Labels**. A window appears.



3 Click on the **Add Box Label Format** button to edit box labels or on the **Add File Label Format** button for files. The following window opens, containing also many lines where each describes a

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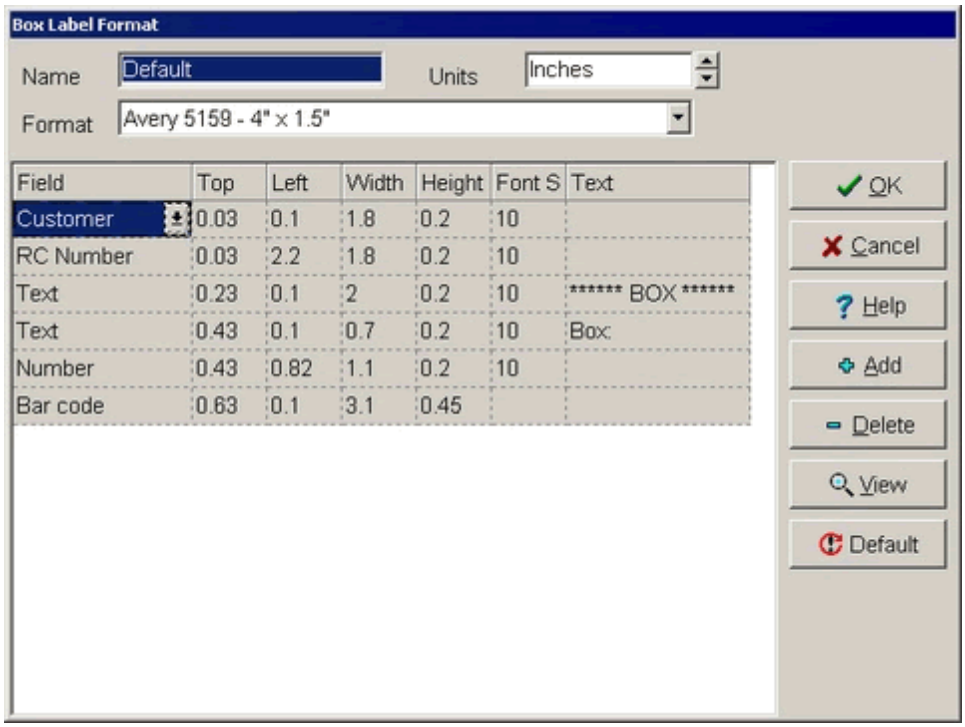
value defined in the system.



4 Lines can be added or removed if desired, and their parameters can be modified. Each line represents an element on the label.

- To add an element on the label, click on the **Add** button.
- To remove an element on the label, click anywhere on the desired line and click on the **Delete** button.
- To modify element's parameters (a line's column), click on the desired parameter (column line) and change it (see step **5** below).
- To view the label's appearance, click on the **View** button. The report's window opens.

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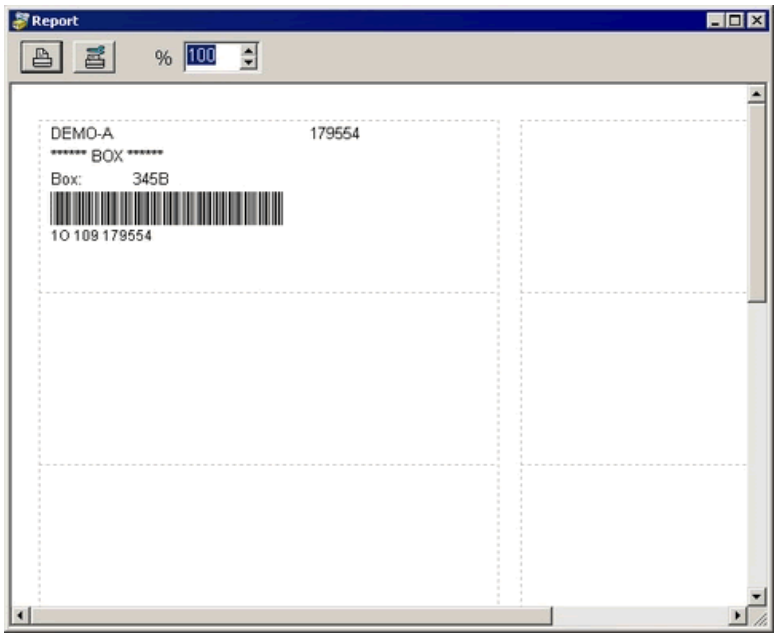

- To restore the system's default values, click on the **Default** button.

5 Here is a description of the parameters that can be set for every element of the label (columns in the window shown in step **3**).

- Field : click on the drop-down button and select the field to include on the label.
- Top : indicate the distance between the element and the top side of the label.
- Left : indicate the distance between the element and the left side of the label
- Width : indicate the width that the element will take up on the label. Characters that do not fit within the width will not appear.
- Height : indicate the height that the element will take up on the label. If the font size is too large, the text will not appear.
- Font size : indicate the point size of the text shown on the element.
- Text : effective only if "Text" has been selected as a field type. Allows to specify the text that will appear on all labels.

6 Click on the **Accept** button from the window shown in step **3**.
7 Click on the **Close** button from the window shown in step **2**.

Note : The *Units* field from the window shown in step **3** allows to select inches or centimeters as the unit for elements on the label. Then it is important to double-check the unit before entering numeric values.

Related topic :

Avery label formats available 266

6.3.2.24.1 Avery label formats available

LETTER FORMAT

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Number	Width (" / cm)	Height (" / cm)	Columns x Rows
Avery 5095	3,38 / 8,59	2,33 / 5,92	2 x 4
Avery 5159	4,02 / 10,2	1,52 / 3,85	2 x 7
Avery 5161	4 / 10,16	1 / 2,54	2 x 10
Avery 5162	4/ 10,16	1,33 / 3,38	2 x 7
Avery 5163	4 / 10,16	2 / 5,08	2 x 5
Avery 5164	4 / 10,16	3,33 / 8,46	2 x 3
Avery 5165	8,5 / 21,59	11 / 27,94	1 x 1
Avery 5197	4 / 10,16	1,5 / 3,81	2 x 6
Avery 5198	3,5 / 8,89	1,67 / 4,24	2 x 6
Avery 5199	3,06 / 7,77	1,83 / 4,65	2 x 5

A4 FORMAT

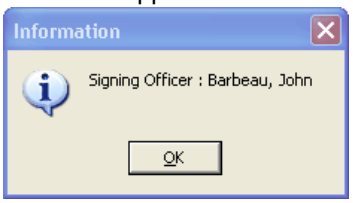
Number	Width (cm)	Height (cm)
L7159	6.4	3.39
L7160	6.35	3.81
L7161	6.35	4.66
L7162	9.9	3.39
L7163	9.9	3.81
L7164	6.35	7.2
L7165	9.9	6.77
L7166	9.9	9.31
L7167	19.96	28.9
L7168	19.96	14.35
L7169	13.9	9.91
L7170	13.4	1.1
L7172	10	3
L7173	9.9	5.7

6.3.2.25 Adding, editing or viewing the signing officer for a customer

The signing officer is the person whose signature will be required for authorization of disposal lists printed by the record center. When no signing officer has been defined, the creator of a disposal list becomes responsible for its authorization.

- To view the signing officer :

1. From the **Customer->Customer Information** module, select **View->Signing Officer**. A window appears.



- To assign a signing officer :

1. From the **Customer->Customer Information** module, select **Edit->Signing Officer**. A window appears.

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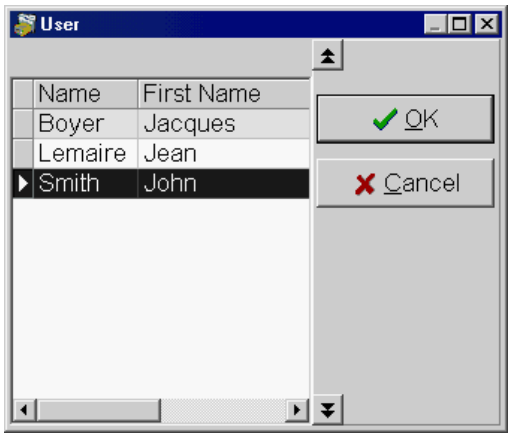


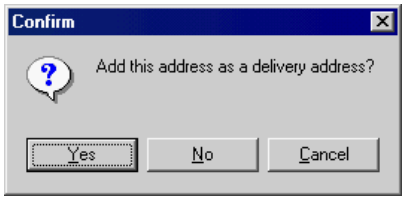
2. Select a user and press **OK**.

Note that rights to authorize disposal lists on *ActiveWeb* are assigned using the *List signing officer* 276 field in the **Customer->Authorized User** module.

6.3.2.26 Adding the default address of a customer for delivery

When creating a new customer, the main address is generally entered in the current module. In order to save some time, this function adds the address automatically in the list of addresses in the *Delivery Address* module.

1. Click on **Customer->Customer Information** from the *Main window*.
2. Click on **Edit->Add Default Delivery Address**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. The address will be displayed in the **Delivery Addresses** module, if an identical address does not already exist for this customer.

6.3.2.27 Adding, viewing or editing ordering notes

1 Click on **Customer->Customer Information** from the *Main window*.
2 Select the wanted customer. Click on **Edit ->Ordering notes**.
3 A window appears.

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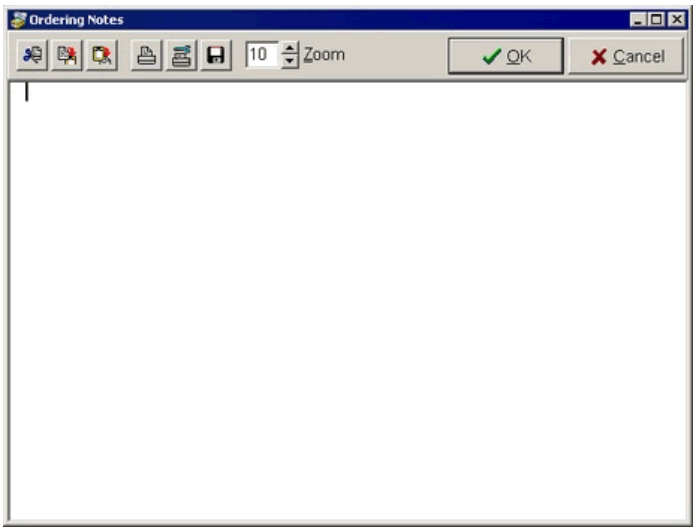


4 Enter, modify or view the wanted information. Press **OK**.

6.3.2.28 Adding customer invoice notes

Invoices provide a useful means of communicating with customers. EDC provides mechanisms for three types of notes. These appear near the bottom of the invoice, in the following order:

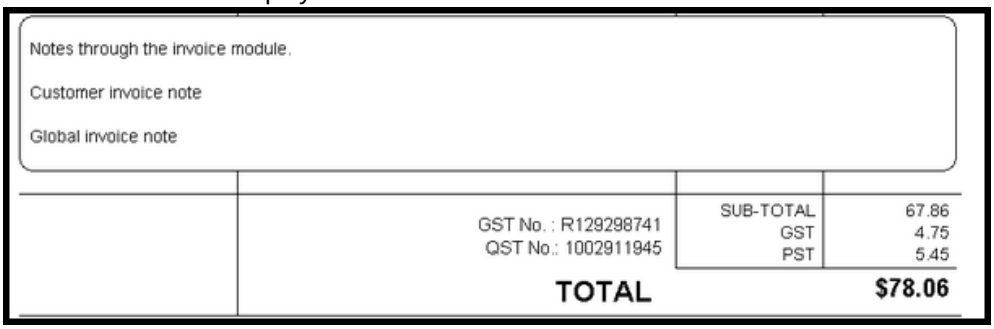
1. Notes, through the **Accounting->Invoice module**, appear on a single invoice.
2. Invoice note, through **Customer->Customer Information module**, appears on all invoices for a customer.
3. Global invoice note, through **Management->System Information module.** Global invoice notes will appear at the bottom of all invoices for which the option to display this note is not deselected in the Invoicing 601 module.

On a given invoice, it is possible to specify whether or not the customer and global notes are displayed.

To add a note to appear for a customer:

1. Open the **Customer->Customer Information** module, and navigate to the correct customer.
2. From the menu, select **Edit->Invoice Note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.



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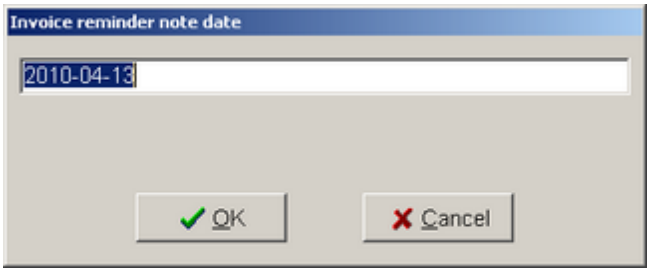
6.3.2.29 Adding, viewing or editing invoice notes for a customer

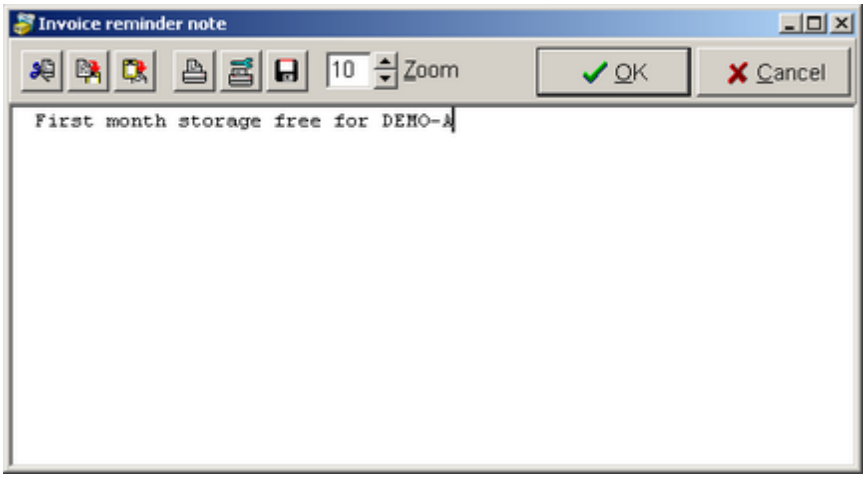
Adding or editing reminder invoice notes

These notes appear after an invoice creation run.
Each note is associated with a customer and a date. Once that date is current or past, the note will be displayed in a modal box after invoice creation for this particular customer. These notes are usually put in to remind you to add or modify certain charges on the invoice for this customer. For example, for a past-due payment charge, or if you have a one-time promotion for this customer.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Select the desired customer. Click on **Edit ->Invoice reminder notes**.
3 A window appears.



4 Enter a date in the field and press **OK.** If this date is current or past during invoice creation, the note will be displayed after the creation.
5 A window appears.



6 Enter the notes in the field and press **OK**. The notes will automatically be added for this customer.

Deleting invoice reminder notes

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Select the wanted customer. Click on **Edit ->Delete Invoice reminder notes**.
3 A window appears.

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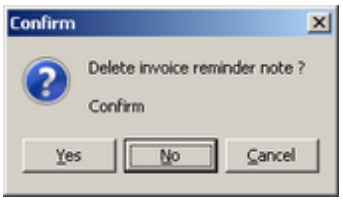
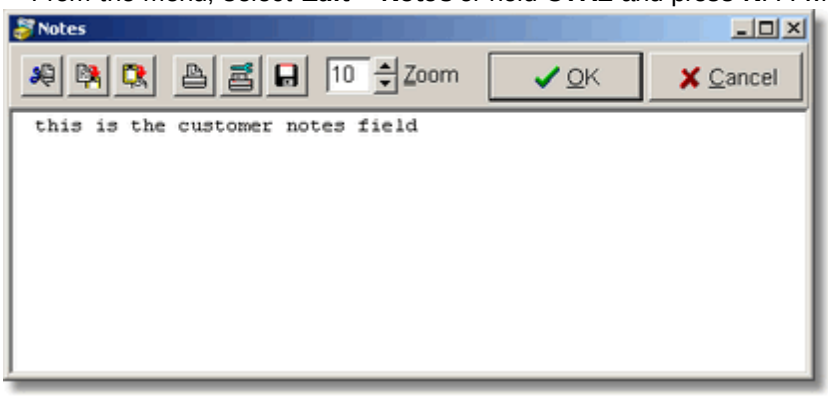


- To confirm the deletion of the notes, press *Yes*.
- To cancel the deletion of the invoice notes, press *No* or *Cancel*.

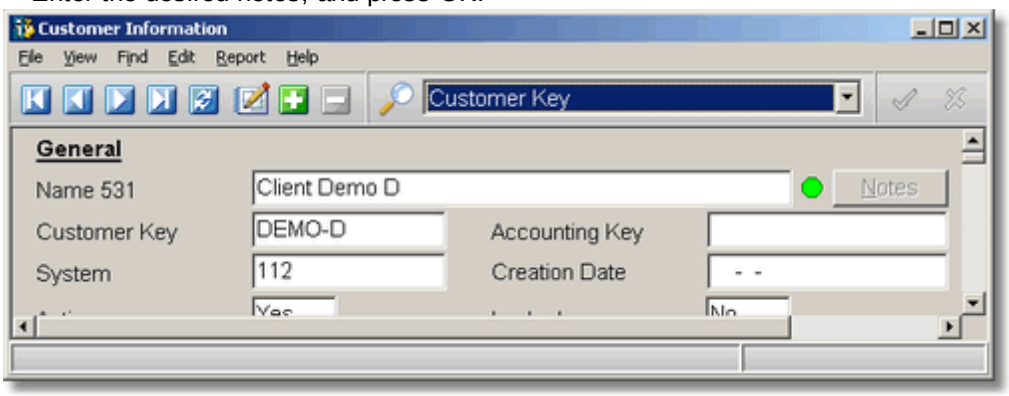
6.3.2.30 Adding, viewing or editing general notes for a customer

These notes are useful for storing general information about a customer.

1. Open the **Customer->Customer Information** module.
2. Navigate to the correct customer.
3. From the menu, select **Edit ->Notes** or hold **CTRL** and press **N**. A window appears.



4. Enter the desired notes, and press OK.



The presence of notes is indicated by a green dot beside the Notes button.
(Notes can also be edited while in edit mode by pressing this button. They can be viewed without edit access while in browse mode by pressing F4.)

6.3.2.31 Adding, configuring or deleting default or custom reports for a customer

It is necessary to specify which information will be displayed on the box and file lists, and their tabulation order. It is also possible to define a report as the one used by default.

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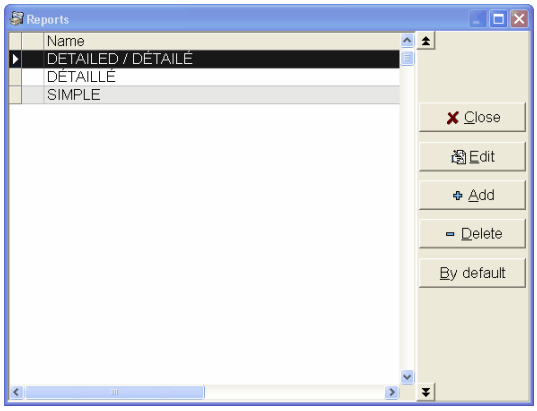
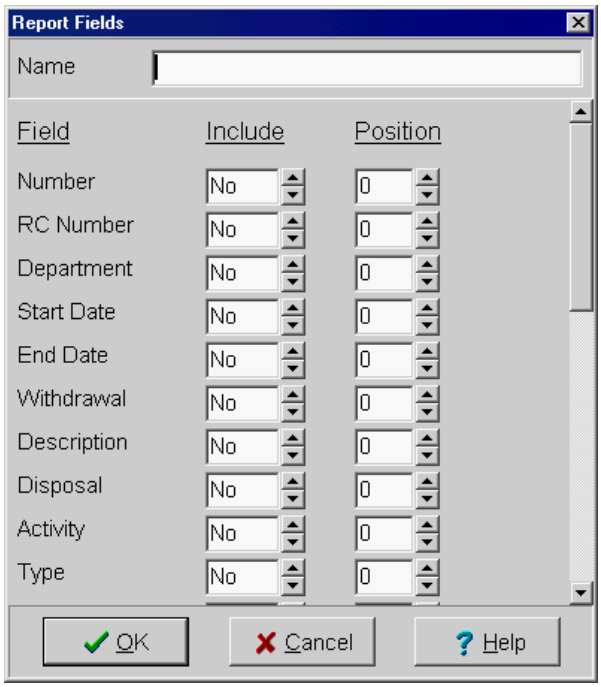
Note : Usually, some pre-defined reports are granted to a customer when he is being created in the system. The reports in question have been defined in the *System Information* 217 module. The current operation allows to edit these reports or to add new reports to the list of available reports.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Report**->**Box Report Fields**|**File Report Fields**. A window appears and contains the reports already defined, if such is the case.



3 Perform one of the following operations :

- To delete a predefined report, select it and click on the **Delete** button.
- To create or modify a predefined report, select it and click respectively on the **Add** or the **Edit** button. A window appears. When adding a new report it is empty but contains the settings already entered for a predefined report that has to be modified.



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Enter or modify the name of the report then click on the choice buttons in the *Include* column and set to "Yes" the fields that must appear on the report. After, click on the choice button in the *Position* column to set the tabulation order of the fields on the report. Press **OK** when all the modifications have been made. The window opened in **2** reappears.

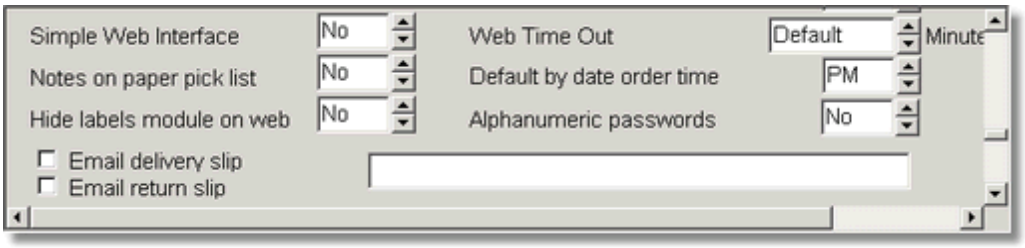
4 Select a report and click on the **By default** button to set this report as the default one. A small mark will appears on the left of this report.

Note : The default report is the one that will be displayed or printed when producing reports, unless choosing another report or setting different fields with the *Report Options* menu of the module concerned.

5 Click on the **Close** button to save changes.

6.3.2.32 Emailing the delivery & return slips

When the *Email delivery slip* box is checked in the **Customer->Customer Information** module, upon delivery creation:
1. The delivery slip will be e-mailed to the address in the adjacent field
2. Order item confirmation will be sent to the e-mail addresses of the authorized users who ordered them.



If the *Email return* slip box is checked, the return slip will be emailed to the adjacent email address when the delivery is returned.

+++ training manual?

6.3.2.33 Enabling and viewing Sales Commissions

+++ training manual?

EDC can be set up to automatically create sales commission reports in the following way:

Set up the customer on whom to apply commissions
1. Open the **Customer->Customer Information** module
2. Specify the *Salesperson* responsible for the sale
3. Check the *Apply commission* box.
4. Specify the start date for commissions
5. Specify the duration of each period, and the percentage commission to apply
6. Press **Ctrl-Enter** or click the **Accept** button to accept changes.

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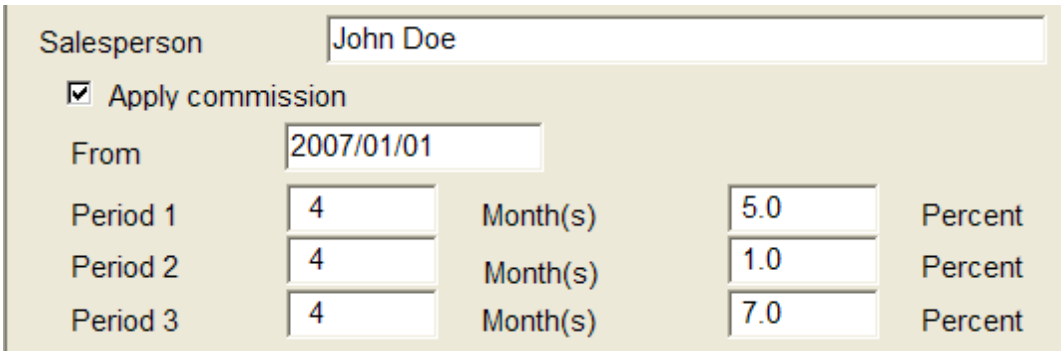
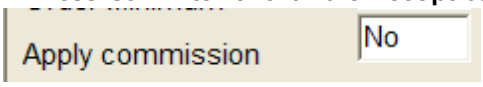


Indicate which goods and services are subject to commission

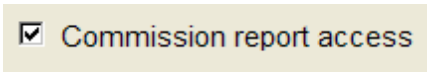
1. In the **Accounting->General Pricing | Customer Pricing** module, navigate to the appropriate price code.
2. Click the **Edit** button or press **Ctrl-E** to switch to edit mode.
3. Set the *Apply commission* field to *Yes* or *No* as appropriate.
4. Press **Ctrl-Enter** or click the **Accept** button to accept changes.



Note: Values in general pricing may be overridden in the **Accounting->Customer pricing** module.

Grant employees access to the Commissions Report

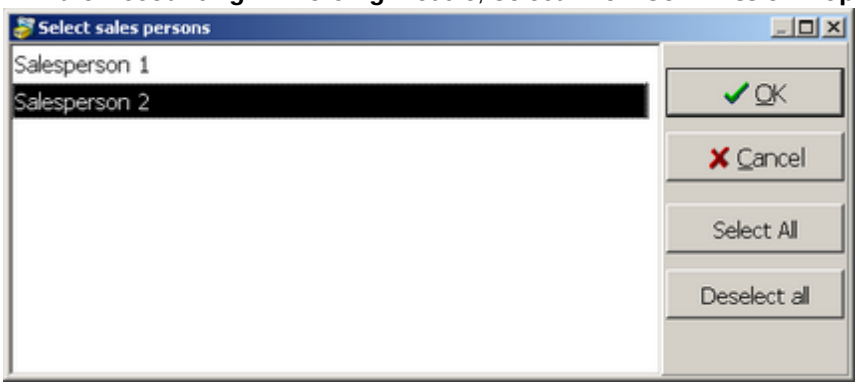
1. In the Management->Employee module, navigate to the appropriate employee
2. Place a check mark in the **Commission report access** box.
3. Press **Ctrl-Enter** or click the **Accept** button to accept changes.



(Note that the employee will also require scroll-access[173] to the Invoicing module.)

View the commission report

1. In the **Accounting->Invoicing** module, select **File->Commission Report**. A window appears.



2. Select the salespeople for whom you wish to view commissions, then press **Enter** or click **OK**.
3. Enter the range of invoice dates over which you wish to view commissions, then press **Enter** or click **OK**.
4. The system will produce a report listing the sales people, commissioned sales totals and commissions per account, and total commissioned sales and commissions per salesperson.

Related topics

Viewing commission reports[608]

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6.3.3 Authorized User

6.3.3.1 Overview (Authorized Users)

Only authorized users may use ActiveWeb or EDC ActiveFile, or place orders over the phone. This module lets you create new authorized users and configure their specific settings and access rights.

Available reports
- List of authorized users, for current customer or for all

Fields 276 **(see the next section)**

Tasks
- Adding or editing a user 278
- Adding or editing access rights for a user 278
- Deleting a user 281
- Editing or viewing the password of a user 280
- Viewing or printing the list of users 281
- Re-enabling access for a user 282

Distinctive menu options:

File menu
- Export user rights to CSV 279

View menu
- Password 280
- Encrypted password 281

Edit menu
- Password 280
- Web search fields definition (box, file, document) 282

Module window:

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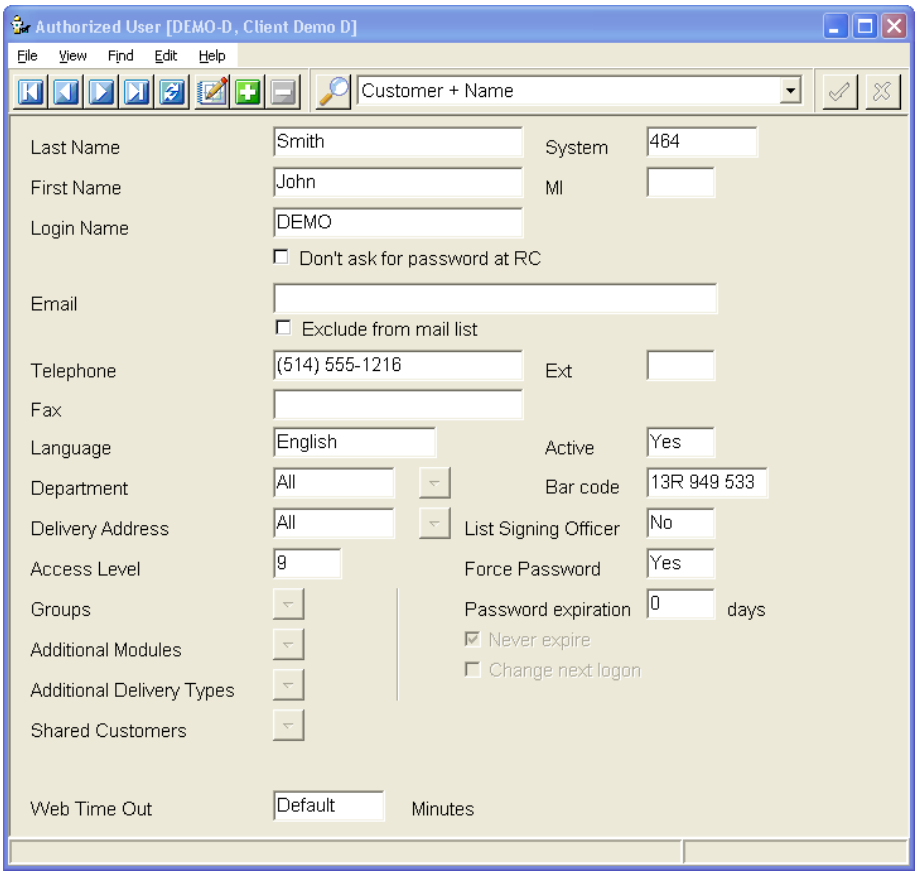

6.3.3.2 Fields (Authorized Users)

Name, First Name, MI, Telephone and EXT
Contact information for the user (MI : Middle Initial; EXT : Extension).

System
Number given to the user by the system and used by the record center.

Login Name
This field is mandatory when ***EDC ActiveFile Software*** is installed at the customer's site. It is mainly used by the software to authenticate orders that are passed between ***EDC ActiveFile*** and ***EDC RC***. It is also possible to log in by using the e-mail address of an authorized user.

Don't ask for password at RC
When this option is selected, the system will not prompt for a password for this user when an order is placed through the Orders->Order module.

Email
Field that allows to enter the email address of the user. This address is particularly used to advise the user when scanned images (*Imaging On Demand* 539 module) are available for consultation. The e-mail address may also be used instead of a login name for ActiveWeb. Note that if two user profiles for the same customer account have the same e-mail address, only the one with the lower system number will be permitted to log in this way.

Fax
This field is included on the delivery slip below the customer address when the ship mode of the

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delivery is Fax.

Language
Choice field containing "English" or "French" (or both languages used by the record center).
This is the language used by ActiveWeb once the user logs in.

Department
Choice field containing "None", "Partial" or "All".
This field gives access to the selected departments. When this field contains "Partial", it is possible to click on the drop-down button and to add or delete individual departments from the selection list.

Delivery Address
Choice field containing "None", "Partial" or "All".
It gives access to the selected delivery addresses. When this field contains "Partial", it is possible to click on the drop-down button to add or delete individual delivery addresses.

Access level 727
Choice field containing values "0" to "9". The value "9" gives access to all documents.Documents accessible to all users within a department are assigned the value "0".

Groups
Drop-down field associated to a list defined in the *User Group* module.
In order to speed up work when adding new users, it is possible to define access profiles by assigning access rights to modules for groups. When creating or editing a user, simply select a specific group to give him access to that group's privileges.

Additional Modules
Drop-down field associated with a list of modules potentially accessible to authorized users. Access rights assigned using this list supplement those assigned to the user groups that a user belongs to.

Additional Delivery Types
Drop-down field listing delivery types available to the customer.
Access rights assigned using this list supplement those assigned to the user groups that a user belongs to.

Shared Customers
Drop-down field listing other record centers acting as RIMS Link points of service 96 (service record centers). The user should exist with the same login and password at the other record centers.

Active
Choice field containing "Yes" or "No".
This field indicates if this user still has access to the system and can place orders with the record center. When the value of this field is "No", the user will no longer appear in the choice list of users when placing orders.

List Signing Officer
Choice field containing "Yes" or "No".
This field allows to indicate if the user can sign disposal lists and authorize the record center to proceed to their treatment.

Force Password
Choice field containing "Yes" or "No".

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When this field is set to "Yes", it means that the user has to give a password when communicating with the record center to place orders.

Note : This field has no effect when the value of the *Force Password* field in the *Customer Information* module is set to "Yes".

Password expiration
This field allows to set an expiration delay for the password. It is also possible to check off a box, in order to indicate that the password will never expire or that it will have to be changed the next use.

Web Time Out
Numeric field determines how many minutes a web connection can remain inactive before the session is automatically terminated for security reasons, after a warning message is ignored. The value can also be set to 'default' (which is typically 15 minutes). It can also be specified for individual users in the *Authorized User* module .

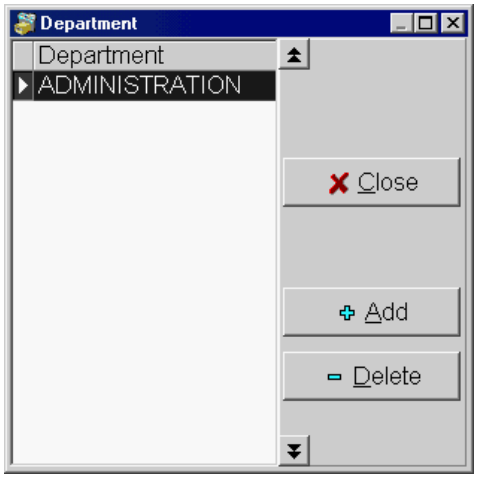
6.3.3.3 Adding or editing a user

1. Click on **Customer**->**Authorized User** from the *Main window*.
2. Perform one of the following operations :
   - To add a user, click on the **Add** button.
   - To edit a user, select the user and click on the **Edit** button.
3. Enter information in appropriate fields (see the fields 276 section for more details).
4. Click on the **Accept** button when finished.

6.3.3.4 Adding or editing access rights for a user

Consult the fields' descriptions 276 to have an outline of the access rights that can be defined for a user.

1. Click on **Customer**->**Authorized User** from the *Main window*.
2. Search for the desired user. When he/she is displayed on the screen click on **Edit**->**Edit**.
3. Move to the *Access Level* 276 field and set a numeric value.
4. Move to the *Department* field and select a value with the choice button. If "Partial" is selected, click on the drop-down button to view a choice list of departments. A window appears, containing departments already granted to the user.



5. Perform one of the following operations :

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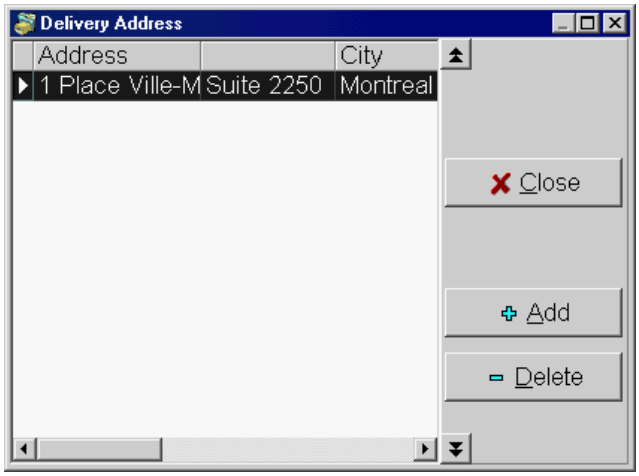
- To remove access to a department, select it and click on the **Delete** button.
- To add access to a department, click on the **Add** button. The list of departments appears. Select a department on the list and press **OK**. The selected department appears in the window opened in **4**.

6 Move to the *Delivery Address* field and select a value with the choice button. If "Partial" is selected, click on the drop-down button to view a choice list. A window appears, containing the delivery addresses already granted to the user.



7 Perform one of the following operations :

- To remove access to an address, select it and click on the **Delete** button.
- To give access to an address, click on the **Add** button. The list of addresses appears. Select a department in the list and press **OK**. The selected address appears in the window opened in **4**.

8 Move to the fields *Groups , Additional modules* and *Additional Delivery Types* and click on the choice buttons. Proceed as for departments and addresses to add or remove access rights.

9 Click on the **Accept** button when finished.

6.3.3.5 Exporting user rights to a spreadsheet

In order to help customers of record center customers to review and update the rights of their users, EDC RC enables you to export a listing of these access rights to a simple text-based spreadsheet format (CSV, or Comma Separated Value).

This data is structured to make it easy to filter for different types of information, for example to see which authorized users have rights to access a given module or delivery address.

1. Click on **Customer**->**Authorized User** from the *Main window*.
2. From the menu, select **File->Export user rights to CSV**.
3. A dialogue window appears. Type the customer key and press **enter**, or press enter to select the customer from a list.
4. Click **No** to not include inactive users.
5. A "Save As" window appears. Specify the name and location for saving the file.
6. This file can now be viewed and processed with a spreadsheet application.

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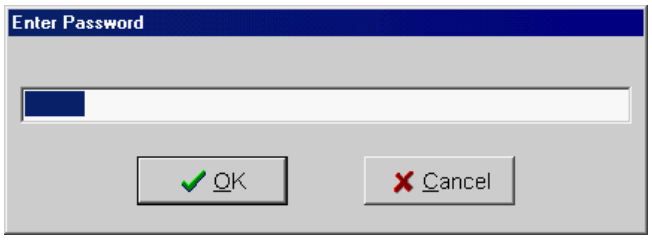
This listing includes:

- Module access rights
- Delivery Addresses
- Delivery Types
- Access level (0-9)
- Active (Y/N)
- Login name, e-mail address, and phone number

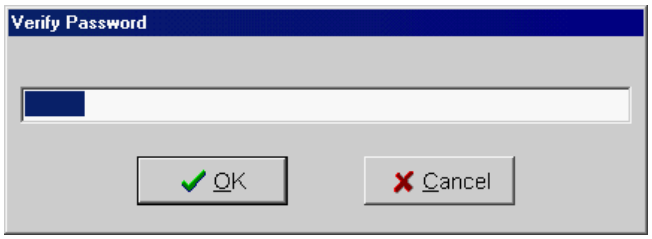
6.3.3.6 Editing or viewing the password of a user

Editing password

1 Click on **Customer**->**Authorized User** from the *Main window*.
2 Search for the desired user and keep him on the screen.
3 Click on **Edit**->**Password**. A window appears.



4 Enter a password of 6 to 18 characters and press **OK**. A new window appears.



5 Enter again the password and press **OK**.

Note : When a password is defined, the user must give it to the record center, when placing orders, even if the value of the *Force Password* fields in the *Customer Information* or *Authorized User* modules is "No". To remove this option, it is necessary to erase the password and set to "No" the *Force Password* fields in the *Customer Information* and *Authorized User* modules. A password can be deleted when performing the current operation without entering a value at steps **4** and **5**.

Viewing password

1 Click on **Customer**->**Authorized User** from the *Main window*.
2 Search for the desired user and keep him on the screen
3 Click on **View**->**Password**. A message appears.

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4 Press **OK** to go back to the module.

6.3.3.7 View encrypted password (for automated order processor)

EDC RC's *Order processor* can be configured to format and forward orders from external systems into EDC without intervention. Please request additional information from support@docudatasoft.com if you require this functionality, as a complete discussion requires programming knowledge and is beyond the scope of this manual.

To view the encrypted password required by the Order Processor:

1. Open the **Customer->Customer Information** module.
2. From the menu select **View->Encrypted password**.

6.3.3.8 Deleting a user

To delete a user, it is only necessary to set him as inactive.

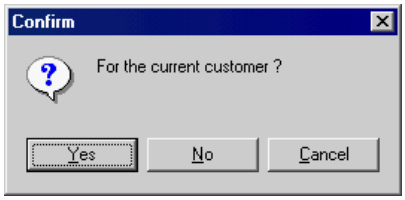
1 Click on **Customer**->**Authorized User** from the *Main window*.
2 Search for the desired user and when he is displayed on the screen click on **Edit**->**Edit**.
3 Move to the *Active* field and set it to "No".

As soon as a user is deactivated, his name will not appear anymore in choice lists of users (ex: when placing an order in the *Orders* module.)

Note that authorized users cannot be made inactive while they have remaining recurring orders.

6.3.3.9 Viewing or printing the list of users

1 Click on **Customer**->**Authorized User** from the *Main window*.
2 Click on **File**->**View Report|Print Report**. A dialog box appears.



3 Click on the **Yes** button to produce a report only for the current customer or click on the **No** button to produce a report including all customers of the record center. Another dialog box appears.

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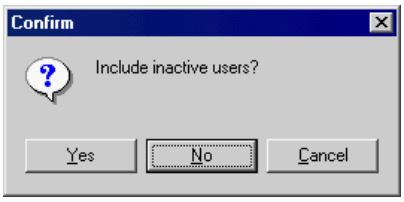
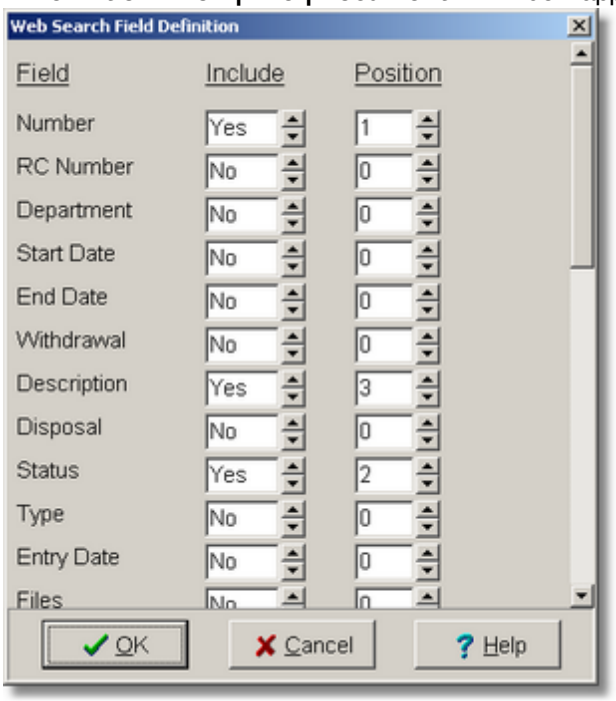


4 Click on the **Yes** button if the inactive users must be included in the report. Soon after, the report is printed or displayed.

6.3.3.10 Modify user web search definitions

On ActiveWeb, the user can specify which fields appear in the summary list of search results. These settings can also be viewed and edited in EDC RC as follows:

1. In the **Customer->Authorized User** module, from the menu select **Edit->Web Search Field Definition->Box | File | Document**. A window appears.



2. If you wish to include a field, set *Include* to *Yes*, and specify a position.
3. Click **Okay** to accept changes.

6.3.3.11 Re-enabling access for a user

Entering incorrect passwords ten times within ten minutes causes an authorized user's profile to be made inactive.

To re-enable access:
1. Open the **Customer->Authorized User** module.
2. Navigate to the correct user.
3. Press **Ctrl-E**, or click the edit button.
4. Set the **Active** 277 field to **Yes**.
5. Press Ctrl-Enter or click the green check mark to accept
6. Change the user's password 280 if necessary.

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6.3.4 User Group

6.3.4.1 Overview (User Group)

Defining user groups allows you to efficiently assign all the access and delivery type rights required for a role (eg. supervisor, data entry) to an authorized user by assigning them to one or more user groups.

Available reports
- list of user groups for current customer or for all
- list of users assigned to group

Fields 283**(see the next section)**

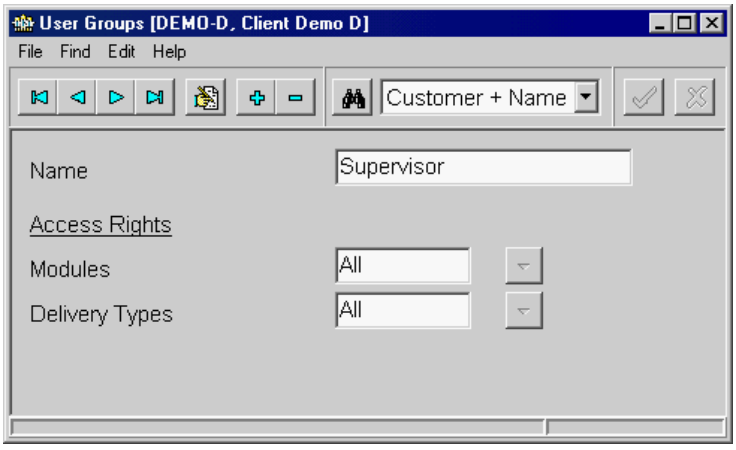
Tasks
- Adding or editing a user group 284
- Adding or editing access rights for a user group 284
- Deleting a user group 286

Distinctive menu options:

View menu
- View users (Viewing or printing the list of user groups 286)

Edit menu
- Copy and add 284

Module window:



6.3.4.2 Fields (User Group)

Name
Name of the group. This name will appear in the drop-down list associated to the *Groups* field in the *Authorized User* module.

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Access Rights

Modules

Choice field containing "None", "Partial" or "All".
This field indicate the access rights to the selected modules. When "Partial" is selected, it is necessary to click on the drop-down button located to the far right of the field, to add or delete the desired modules.

Delivery Types

Choice field containing "None", "Partial" or "All".
This field indicate the access rights to the selected delivery types. When "Partial" is selected, it is necessary to make a selection as for the previous field.

6.3.4.3 Adding or editing a user group

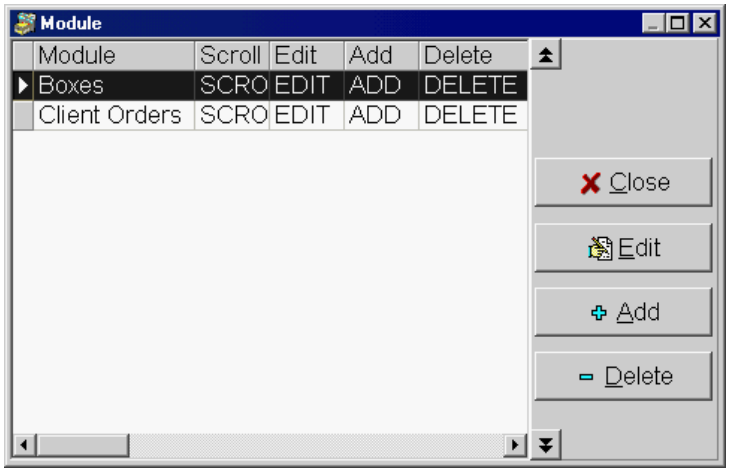
1. Open the **Customer->User Group** module
2. Perform one of the following operations :

- To add a user group, click on the **Add** button.
- To modify a user group, search for it and click on the **Edit** button when it is displayed on the screen.
- To copy an existing group to a new customer, navigate to the group to be copied, and select **Edit->Copy and add**.

3. Enter or modify the name of the group in the *Name* field.
4. Set the **Modules** and **Delivery Types** access parameters (see the next section 284 for more details).
5. Click on the **Accept** button.

6.3.4.4 Adding or editing access rights for a user group

1 Click on **Customer**->**User Group** from the *Main window*.
2 Search the desired user groups and click on the **Edit** button when this group is on the screen.
3 Move to the *Modules* field and select the desired value. If "Partial" is selected, click on the drop-down button to the far right of the field. A window appears, containing the modules already granted to the group.



Note : 4 different access rights can be granted to one module.

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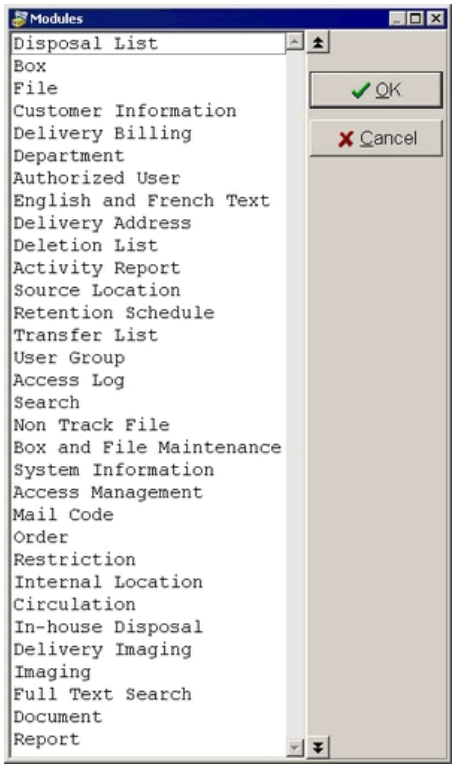
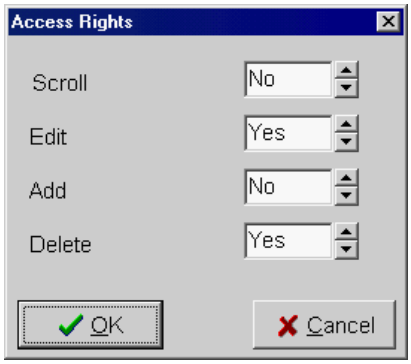
S : Scroll; E : Edit; A : Add; D : Delete.

4 Perform one of the following operations :

- To remove the access rights to a module, select it and click on the **Delete** button.
- To add access rights to a module, click on the **Add** button. A window appears.



Select a module and press **OK**. A window is displayed and allows to specify the access rights to the selected module.



Click on the choice button of the desired fields, set them to "Yes" and press **OK**. The module, including its access rights, appears in the window opened in **3**.

5 Move to the *Delivery Types* field and follow the same steps as for that attribution of access rights to modules.

6 Click on the **Accept** button to save the changes.

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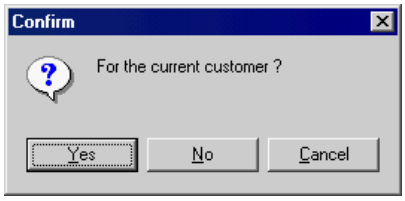
6.3.4.5 Deleting a user group

1 Click on **Customer->User Group** from the *Main window*.
2 Search for the desired group and click on the **Delete** button when this group is on the screen.

Note : To delete a group, it must not be granted to any authorized user. If it becomes necessary to delete it, open the *Authorized User* module and remove the user group in the *Groups* field of the related users (see "Adding or editing access rights of a user 278").

6.3.4.6 Viewing or printing the list of user groups

1 Click on **Customer->User Group** from the *Main window*.
2 Click on **File->View Report|Print Report**. A dialog box appears.



3 Click on the **Yes** button to produce a report for the current customer only or click on the **No** button to produce a complete report. The report will be printed or displayed soon after.

6.3.5 Retention Schedule

6.3.5.1 Overview (Retention Schedule)

Managing the retention of different document types is a vital aspect of records management.

This module permits you to create, edit, and consult document type profiles used in classifying records and calculating when and how to dispose of them.

It is possible to associate restrictions to these document types and departments, and it is also possible to edit their notes

Available reports
- list of document types

Fields 287 (see the next section)

Tasks
- Creating or editing a document type 289
- Adding or removing restrictions associated to a document type 291
- Viewing or printing the list of document types, including restrictions and retention periods 292

Distinctive menu options:

View menu

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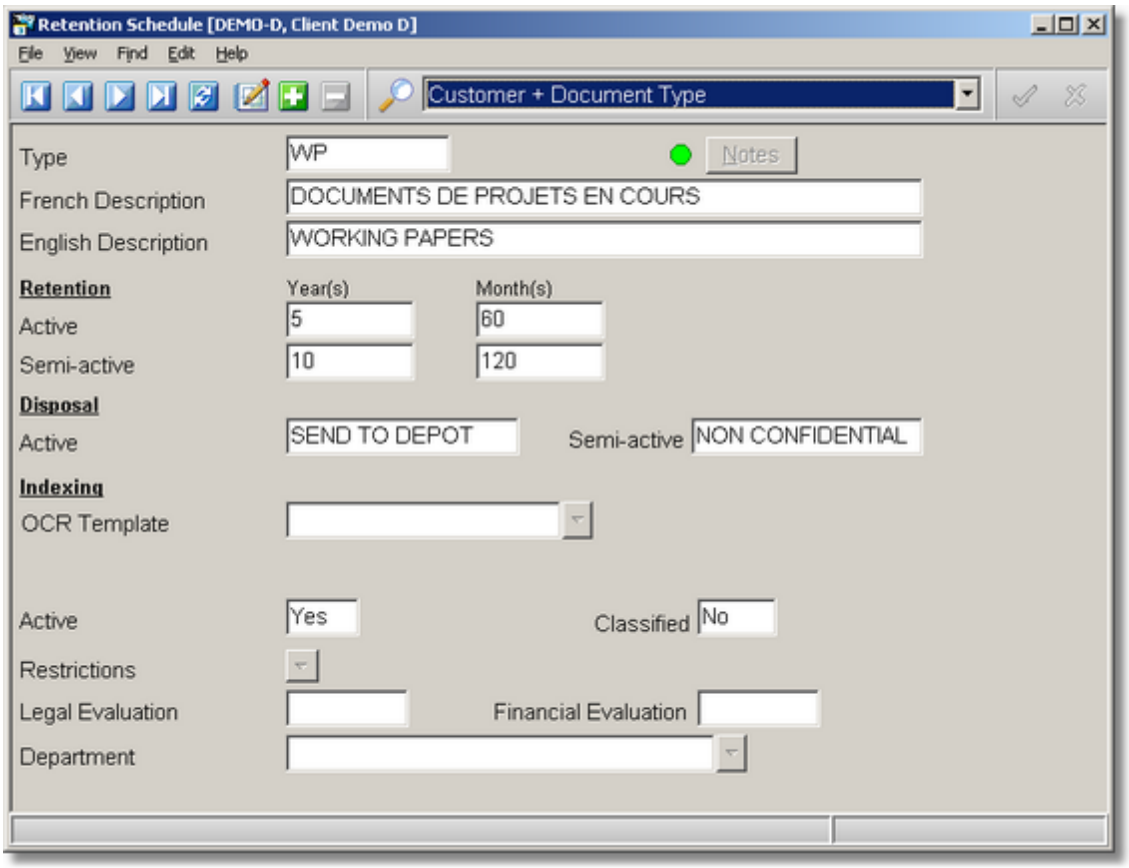
- Notes (Viewing notes or restrictions associated to a document type) 291
- Restrictions

Edit menu

- Notes (Adding or editing notes associated to a document type 290)
- Transfer (Transferring documents from a document type to another 289)

Module window:



6.3.5.2 Fields (Retention Schedule)

Type
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name of the document type. This value will appear in the drop-down list associated with *Type* field of the *Box* and *File* modules.

French Description and English Description
Optional alphanumeric fields containing a maximum of 80 characters each.
These fields give the French and the English description of the document type.

Retention

Active
Numeric field containing a value up to 999 years or 11 988 months.
This field indicates the active retention period for boxes and files of the selected type.

Semi-Active
Required numeric field containing a value up to 999 years or 11 988 months.

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This field indicates the semi-active retention period for boxes and files of the selected type.

Note : If the conservation policy is based on document types and if the conservation periods are modified , the system will ask if the disposal dates for the boxes and files have to be updated. When this is the case, the system may be busy for a while if many documents are associated with the edited types.

Disposal

Active

Drop-down field that can contain the values described below .
This field indicates how the documents will be disposed of at the end of their active retention period.

Semi-active

Drop-down field that can contain the values described below.
This field indicates how the documents will be disposed of at the end of their semi-active retention period.

The following list describes the disposal modes :

CONFIDENTIAL
These documents will be disposed in a confidential manner.

NON-CONFIDENTIAL
These documents will be disposed in a non-confidential manner.

NONE
A disposal mode has not been determined.

PERMANENT
These documents will never be disposed of.

REVISION
These documents will be placed on a list so that they can undergo a special verification before being disposed of.

SAMPLE
These documents will be placed on a list so that samples can be extracted before disposing of the remaining items.

SEND TO DEPOT
Documents must be sent to another storage area, different from the off-site record center, where they will be stored indefinitely. From that moment on, the off-site record center will no longer be responsible for the conservation of the documents.

Indexing

OCR Templates

Read-only drop-down field.
This field is only available for customers that have ***EDC ActiveFile***. This field indicates the template that will be used for the auto-indexing of the images. The templates are defined by the customer in the customer version of ***EDC*** (***EDC ActiveFile***).

Active

Choice field containing "Yes" or "No".

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When the value of this field is "No", this type is set as inactive and can no longer be associated to documents.

Classified
Choice field containing "Yes" or "No".
This field indicates that the document has a classified status.This field is for internal use.

Restrictions
Drop-down field containing the values defined in the *Restriction* 303 module.
This field is viewable only when the *Restriction Integrity* field of the *Customer Information* module is set to "Yes", and when the customer is not electronically linked to the record center. This field indicates the restrictions associated with the selected type.

Legal Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
This field indicates how long the document needs to be conserved from a legal point of view. This field is for internal use.

Financial Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
Indicates how long the document needs to be conserved from a fiscal point of view. This field is for internal use.

Department
Drop-down field associated to a list defined in the system.
This field is visible only when the *Types by department* field of the *Customer Information* module is set to "Yes". It indicates the department that will automatically be attributed to a document of the selected type.

6.3.5.3 Creating or editing a document type

Consult the fields' descriptions 287 above to have an outline of the settings that can be entered.

1. Click on **Customer**->**Retention Schedule** from the *Main Window*.
2. Perform one of the following operations :
   - To create a document type, click on the **Add** button.
   - To modify a document type, search it and click on the **Edit** button when the document type is displayed on the screen.
3. Enter or modify the information in the appropriate fields.
4. Click on the **Accept** button.

Note : When accepting modifications, a window appears and lets you enter notes. Proceed if so desired and press **OK**.

6.3.5.4 Transferring documents from a document type to another

This operation allows to transfer all the documents from a document type to another one. For example, if a company decides that they reduce the amount of document types, one will need to perform this operation.

1. Click on **Customer**->**Retention Schedule** from the *Main Window*.
2. Click on **Edit**->**Transfer**. A window is displayed.

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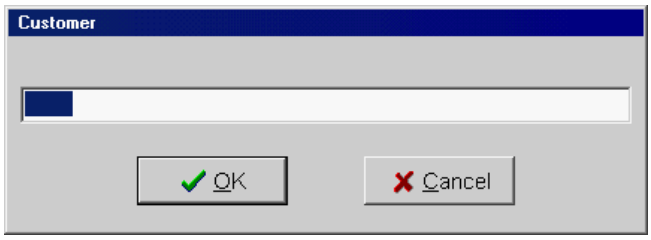
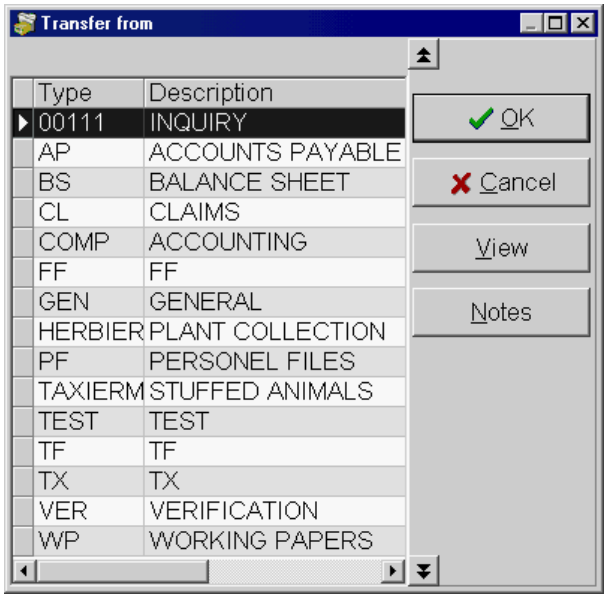


Enter a customer code and press **OK**.

3 A window appears.



Select the source document type and press **OK**.

Note : The *View* and *Notes* buttons allow respectively to view the active and semi-active retention period of the selected document type, and also its related notes.

4 A window appears, similar to the one opened in **3**, and allows to select a target document type. Proceed and press **OK**.

5 The system automatically transfers the documents. This operation may take some time if the concerned document type contains many documents.

6.3.5.5 Adding or editing notes associated to a document type

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.

2 Search the desired document type and click on **Edit**->**Notes** when the type is on the screen. A window appears and contains the notes already defined if such is the case.

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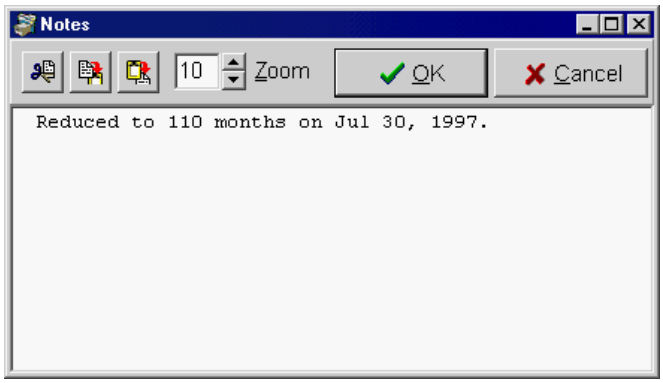

3 Enter or modify the notes and press **OK**.

6.3.5.6 Adding or removing restrictions associated to a document type

This operation is usually performed for customers that are not electronically linked to the off-site record center. Customers that use ***EDC ActiveFile*** can proceed from their workstation, since they are electronically linked to the record center .

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Select the desired document type and click on the **Edit** button when the type is on the screen.
3 Click on the drop-down button beside the *Restrictions* field. The following window appears, containing the restrictions already associated to the document type.

4 Perform one of the following operations :
- To add a restriction, click on the **Add** button. Select a restriction in the list that is displayed and click on the **Accept** button.
- To delete a restriction, select it and click on the **Delete** button.

5 Repeat step **4** to add or delete other restrictions.
6 Click on the **Close** button to terminate the additions and removals.
7 Click on the **Accept** button to save the changes.

6.3.5.7 Viewing notes or restrictions associated to a document type

1 Click on **Customer**->**Retention Schedule** from the *Main window*.
2 Search the desired document type and click on **View**->**Notes|Restrictions** when this type is displayed on the screen. Notes and restrictions will be printed or displayed automatically.

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6.3.5.8 Viewing or printing the list of document types, including restrictions and retention periods

1 Click on **Customer**->**Retention Schedule** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. The report is printed or displayed soon after.

6.3.6 Department

6.3.6.1 Overview (Department)

This module allows the management of departments and sub-departments for customers of the record center.

The information about departments and sub-departments can be displayed or printed. New departments and sub-departments can also be created. This information will be used to categorize boxes and files.

Available reports
- List of departments and sub departments, for current customer or all

Fields 293 **(see the next section)**

Tasks
- Creating or editing departments and sub-departments 293
- Deactivating sub-departments 295
- Transferring documents of a sub-department to another department 295
- Transferring documents of a sub-department to an existing sub-department 296
- Viewing or printing the list of departments, including sub-departments 298

Distinctive menu options:

View menu
- Document types 294

Edit menu
- Transfer
  - Sub to main department 295
  - Sub to sub-department 452

Module window:

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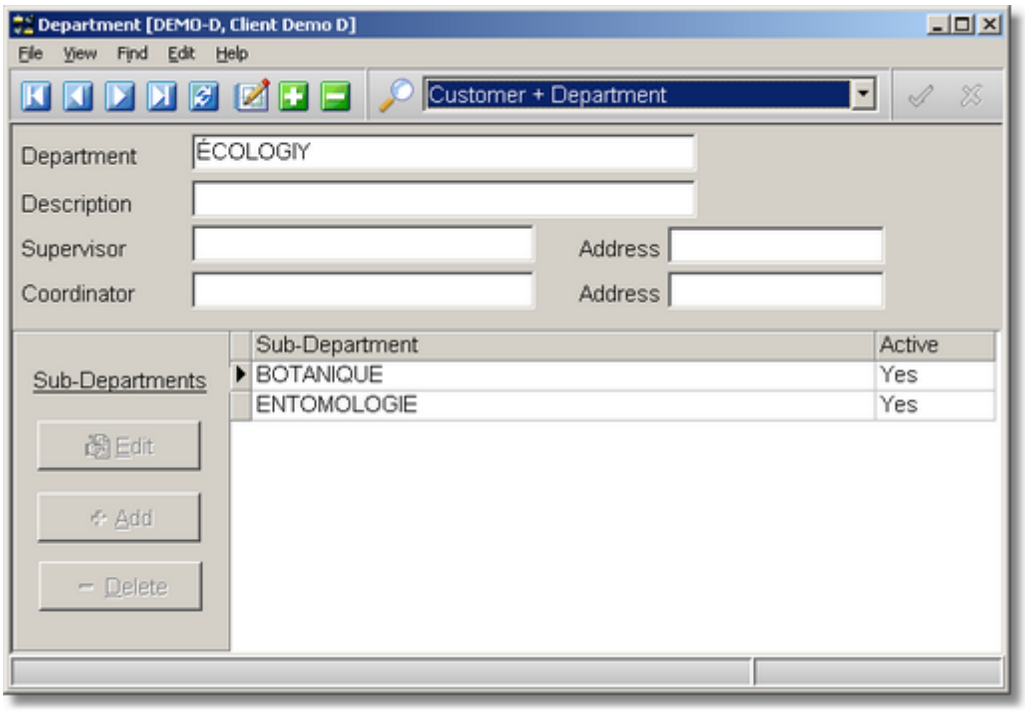

6.3.6.2 Fields (Department)

Department
Required alphanumeric field containing a maximum of 30 characters.
This field indicates the department's name. This value will appear in the drop-down lists associated with the *Department* field in the *Box* and *File* modules.

Description
Alphanumeric field containing a maximum of 35 characters.
This field allows to enter a description for the department.

Supervisor and Address
This field shows the name and address of the supervisor for this department at the customer's office. This field is for internal use.

Coordinator and Address
Here are the name and address of the coordinator for this department at the customer's office. This field is for internal use.

Sub-Departments
Required alphanumeric field containing a maximum of 30 characters.
This field indicates the list of the sub-departments for the selected department.

6.3.6.3 Adding or editing departments and sub-departments

One department and one sub-department have to be created before entering the first box in the inventory. A department needs to contain at least one sub-department. Every document in the inventory has to be associated to a department and a sub department.

The definition of departments and sub-departments is extremely important for customers whose billing or retention is done by department (see the *Billing* 225 and *Retention* 225 fields of the

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Customer Information module).

The modification of a department can be performed at the record center for customers that do not use ***EDC ActiveFile***. Note that customers who do use ***EDC ActiveFile*** must modify their departments themselves, since they are electronically linked to the record center.

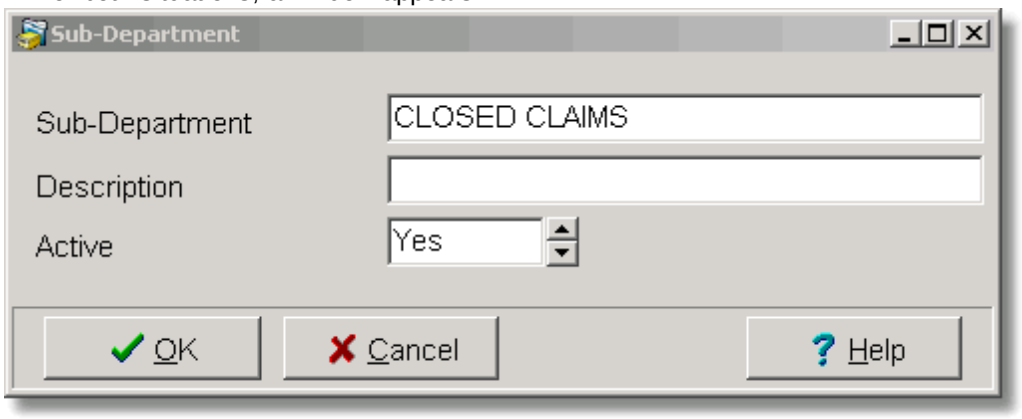
1 Click on **Customer->Department** from the *Main window*.
2 Make one of these operations :
- To add a department, click on the **Add** button.
- To modify a department, select it and click on the **Edit** button.

Note : When adding, a dialog box appears and asks for a customer code. Enter the code of the desired customer and press **OK**.

3 Move to the *Department* field and enter or modify the name of the department.
4 Move to the *Supervisor* field and enter or modify the name and address of the supervisor.
5 Move to the *Coordinator* field ant enter or modify the name and address of the coordinator.
6 Move to the *Sub-department* section and perform one of the following operations :

- To add a new sub-department, click on the **Add** button.
- To modify an existing sub-department, select the desired item in the list of sub-departments and click on the **Edit** button.

For both situations, a window appears.



Note : When adding a new sub-department, this window does not contain any information.

Enter or modify the name of the sub-department and specify if this sub-department is active or not. Click on the **Accept** button.

7 Click on the **Accept** button of the module when finished.

6.3.6.4 View document type (department module)

If a customer has the option *types by department* 232 set to Yes in the **Customer->Customer Information** module, document types created in the *customer->retention schedule module* 287 will be assigned to a department.

To view document types belonging to a department

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1. In the **Customer->Department** module, select **View->Document type**. If document types have been assigned, the list appears.

6.3.6.5 Deactivating sub-departments

In order to deactivate a sub-department, it only needs to be edited and set as inactive.

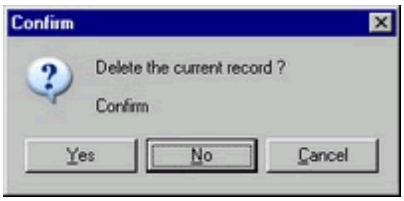
See step **6** in "Adding or editing departments and sub-departments 293" for more details.

Note that if a department is included on a departmental invoice, EDC will produce an error message if you attempt to inactivate the final remaining sub-department.

6.3.6.6 Deleting a department

In order to delete a department, it must have no assigned boxes or file for that customer. The option to delete will only be available if the customer is not replicated.

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Delete** or click on the **Delete** button from the icon bar. A window appears.



3 To accept the deletion of the department press *Yes*; to cancel the operation press *No* or *Cancel*.

Note: An error message will appear if the selected department is assigned to an item. One must do a search for boxes and files related to that department and change their departments before successfully performing the operation.

6.3.6.7 Transferring documents of a sub-department to another department

This operation will simply move the sub-department from its department to a different department. The target department must not contain a sub-department of the same name. The original sub-department will be erased.

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Transfer**->**Sub to Main Department**. A window appears and asks to specify which customer is concerned by the operation.
3 Enter the code of the desired customer and press **OK**. A window opens.

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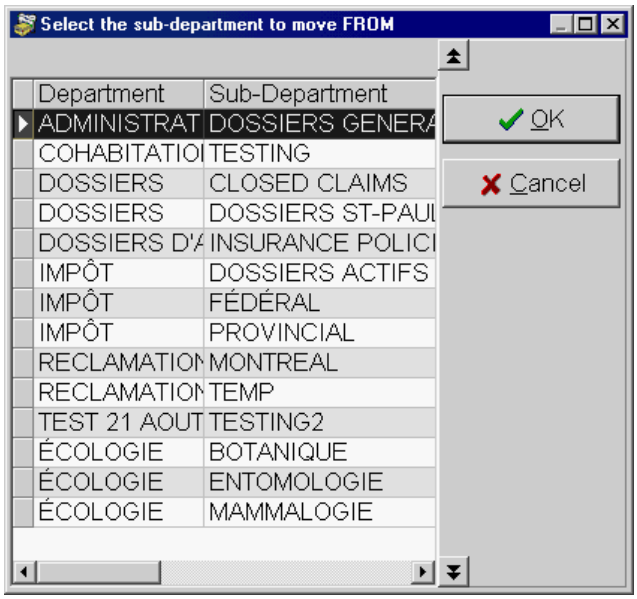
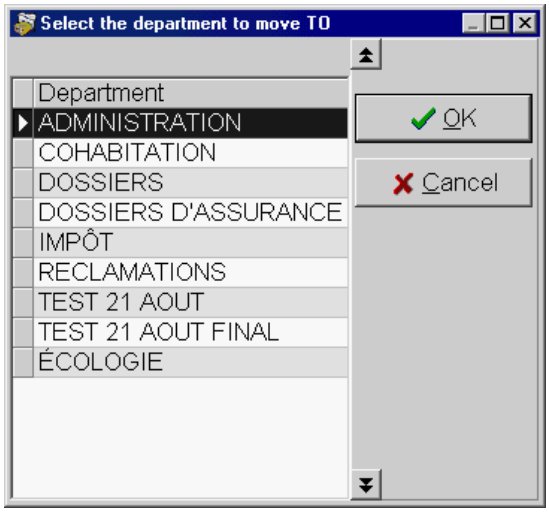


4 Select the sub-department to be moved and press **OK**. Another window is displayed.



5 Select the target department and press **OK**. The source sub-department is deleted in the system.

6 The system moves all the documents of the sub-department previously selected. A message is displayed on the screen during the moving and indicates the update of boxes and files in question. This message disappears automatically when finished.

Note : This operation may take some time if the concerned sub-department contains many documents.

6.3.6.8 Transferring documents of a sub-department to an existing sub-department

This operation will move all the documents from a sub-department to an other existing sub-department. The documents are added to the content of the target sub-department and the source sub-department is not deleted from the system.

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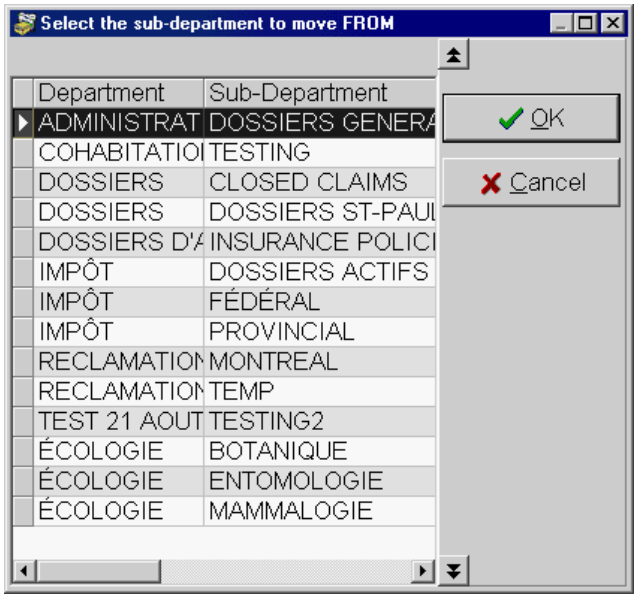
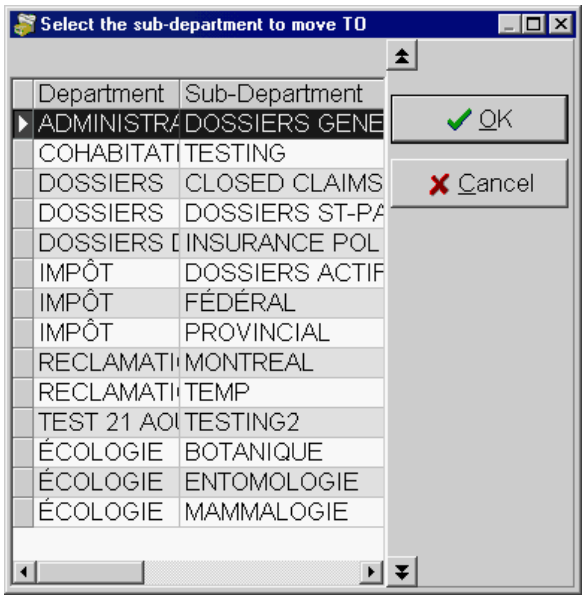
1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Transfer**->**Sub to Sub-Department**. A window appears and asks to specify which customer is concerned by the operation.
3 Enter the code of the desired customer and press **OK**. A new window opens.



4 Select the source sub-department and press **OK**. Another window is displayed.



5 Select the target sub-department and press **OK**. The transfer is automatically done in the system.
6 The system transfers all the documents of the source sub-department. A message is displayed during the transfer and indicates the update of boxes and files in question. This message automatically disappears when the transfer is finished.

Note : This operation may take some time if the source sub-department contains many

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documents.

6.3.6.9 Viewing or printing the list of departments, including sub-departments

1. Click on **Customer**->**Department** from the *Main Window*.
2. Click on **File**->**View Report**|**Print Report**.
3. The report is automatically printed or displayed.

6.3.7 Source Location

6.3.7.1 Overview (Source Location)

Customers may specify a Source for boxes and files 311. This module manages the list of sources that the customer may select from.

Available reports

- List of source locations (for current customer or all)

Fields 299 (see the next section)

Tasks

- Creating or editing a source location 299
- Deleting a source location 299
- Viewing or printing the list of all source locations 300

Distinctive menu options:

- (None)

Module window:

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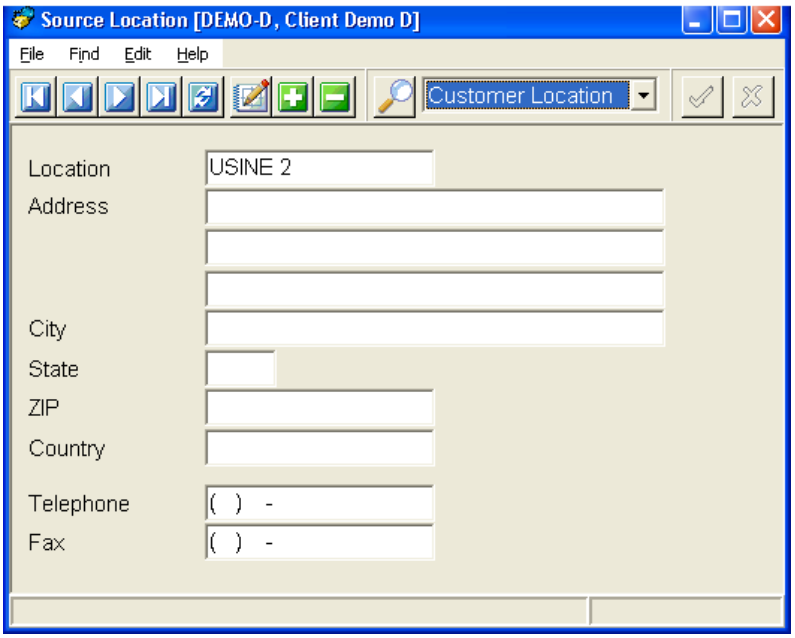

6.3.7.2 Fields (Source Location)

Location
Required alphanumeric field containing a maximum of 10 characters.
Indicates the location's code. This value will be displayed in the drop-down list associated with the *Source* field of the *Box* module.

Coordinates
Optional alphanumeric fields giving details about the location's coordinates.

6.3.7.3 Adding or editing a source location

1. Click on **Customer->Source Location** from the *Main window*.
2. Perform one of the following operations :
   - To add a source location, click on the **Add** button.
   - To modify a source location, perform a search and click on the **Edit** button when the desired source location is displayed on the screen.

Note : When adding a new location, a window appears and asks to specify which customer is concerned. Enter the code of the desired customer and press **OK**.

3. Move to the *Location* field and enter or modify the appellation of the source location.
4. Enter or modify the coordinates of the source location in the appropriate fields.
5. Press **OK** in order to save the modifications.

6.3.7.4 Deleting a source location

1. Click on **Customer->Source Location** from the *Main window*.
2. Perform a search to find the source location to be deleted.
3. When the desired location is displayed on the screen click on the **Delete** button. A dialog box appears.

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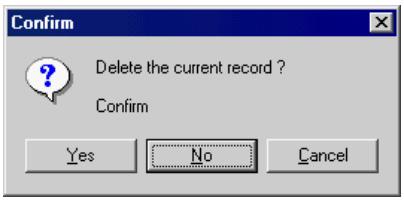

4 Click on the **Yes** button to confirm the deletion.

Note : In order to be deleted, a source location must not be associated with any box. It will then be necessary to open the *Box* module and remove that source location from the *Source* field for all the boxes that have it.

6.3.7.5 Viewing or printing the list of all source locations

1 Click on **Customer->Source Location** from the *Main window*.
2 Click on **File->View Report|Print Report**. The report will be displayed or printed automatically from the default printer.

6.3.8 Delivery Address

6.3.8.1 Overview (Delivery Address)

This module permits you to add and modify delivery addresses for customers. It is also possible to add notes to appear on the delivery slip for that address. (eg. "Use elevator #2")

Available reports
- List of all delivery addresses (for one or all customers).

Fields301 **(see the next section)**

Tasks
- Adding or editing a delivery address 302
- Deactivating a delivery address 302
- Editing or viewing notes associated with a delivery address 303
- Viewing or printing the list of delivery addresses 303

Distinctive menu options:

View menu
- Notes 303

Edit menu
- Notes 303

Module window:

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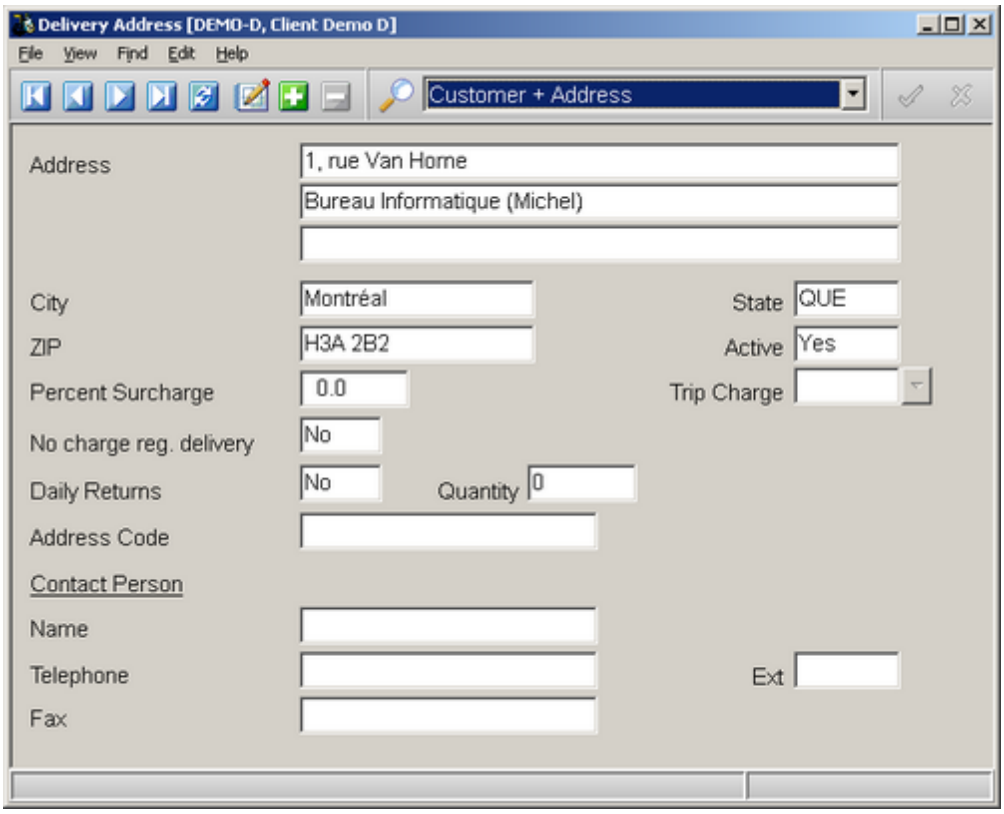

6.3.8.2 Fields (Delivery Address)

Address/City/Province/Postal Code
These fields indicate the exact coordinates of the delivery address.

Active
Choice field containing "Yes" or "No".
This field indicate if the delivery address is active. When it is set to "No", the address will not appear on the list associated to the *Delivery Address* field of the *Authorized User* module or on the choice list of the *Orders* module when placing an order.

Percent Surcharge
Choice field containing values "0.0" to "999.9"
This field allows the charges for item delivery handling, trip charge, and fuel surcharge to be increased for the specified customer addresses by the specified amount when the delivery type has courier set to 'Record Center'. It is not applied when the courier is imaging, fax, or external.

Example: If the basic trip charge is $10 and a % surcharge of 50% is applied for this address, the trip charge will appear on the delivery and invoice as $15.

Trip Charge
A choice field allows the selection of a price code. This price code will be added once per delivery to this address for delivery types that use "record center" courier method.

No charge reg. delivery
Choice field containing "Yes" or "No".
When this field is set to "Yes", no transport costs are billed for regular deliveries for this address.

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Daily Returns
Choice field containing "Yes" or "No".
When this field is set to "Yes", an order for return items is automatically created by the system for each working day. The order is created at the same time as a picking list in the *Picking List* 526 module. The daily returns are set for AM or PM, according to the pick up settings of the client in the *Customer Information* 225 module.

Quantity
Numeric field containing a maximum of 4 characters.
This field indicates how many items must be returned daily. This field is effective only when the previous field is set to "Yes".

Address code
Alphanumeric field containing a maximum of 15 characters.
This field provides an alternate identification for a delivery address.

Contact Person
Name/Ext/Telephone/Fax
These fields allow to enter the name and coordinates of the person responsible for deliveries at this address.

6.3.8.3 Adding or editing a delivery address

1. Click on **Customer**->**Delivery Address** from the *Main window*.
2. Perform one of these operations :
   - To add an address, click on **Edit**->**Add**.
   - To modify an address, find the desired address and keep it on the screen. click on **Edit**->**Edit**.

Note : When adding an address, a window appears and asks to specify which customer is concerned. Enter the code of this customer and press **OK**.

3. Enter or modify the desired information in the appropriate fields.
4. Click on the **Accept** button when finished.

6.3.8.4 Deleting a delivery address

For record-keeping reasons, a delivery address is never deleted in the system. When judged necessary, an address can be deactivated in order to prevent delivery errors.

1. Click on **Customer->Delivery Address** from the *Main window*.
2. Find the desired address and keep it on the screen, click on **Edit->Edit**.
3. Move to the Active field and set it to **"No"**.
4. Click on the **Accept** button to save changes.

Note: Delivery addresses cannot be made inactive while future tape rotations are scheduled for it. If a warning similar to the following appears, you may use the 'change the delivery address' 360 function from the **Inventory->Rotation Schedule** to change the delivery address for the affected tapes if appropriate.

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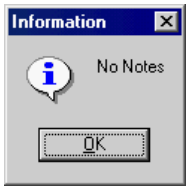
6.3.8.5 Editing or viewing notes associated with a delivery address

1. Click on **Customer**->**Delivery Address** from the *Main window*.
2. Find the desired address and keep it on the screen.
3. Perform one of these operations :

   - To add or edit notes, click on **Edit**->**Notes**. The report's window appears. Enter or edit the notes and press **OK**.
   - To display notes, click on **View**->**Notes**. The report's window appears. Click on the **Close** button to end the viewing.

Note : If no notes have been defined, a message appears.



Press **OK** to go back to the module.

6.3.8.6 Viewing or printing the list of delivery addresses

1. Click on **Customer**->**Delivery Address** from the *Main window*.
2. Click on **File->View Report|Print Report**. The report is automatically displayed or printed form the default printer.

6.3.9 Restriction

6.3.9.1 Overview (Restriction)

Restrictions are used to prevent some documents from being put on a disposal list inadvertently. Every document associated with a restricted type will be preserved as long as the restriction is in place, unless they are specifically put on a disposal list. Once defined, restrictions can be applied or removed 291 in the *Retention Schedule* 286 module.

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Available reports
- list of all restrictions (for all customers or current customer)

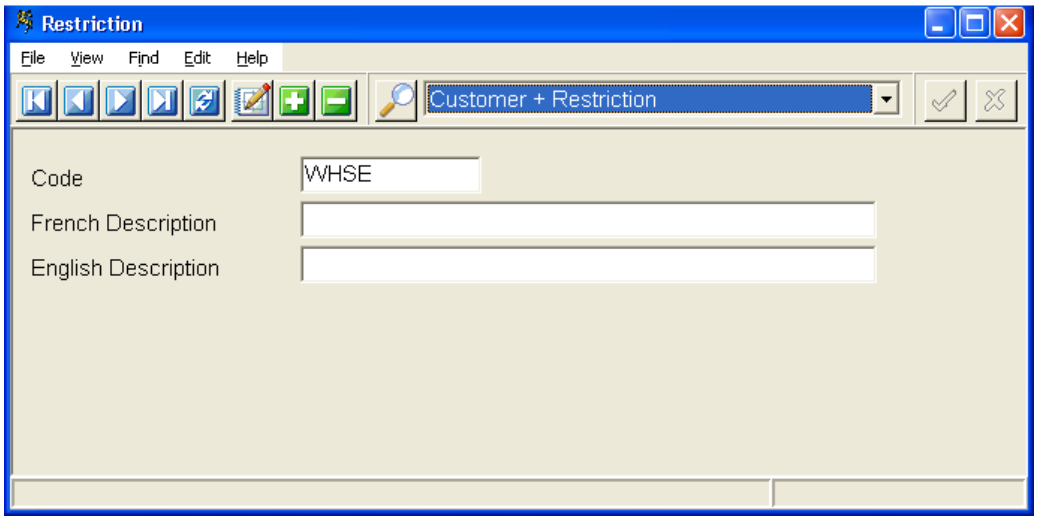
Fields304 **(see the next section)**

Tasks
- Adding or editing a restriction304
- Deleting a restriction305
- Viewing or printing document types related to a restriction305
- Viewing or printing the list of all restrictions305

Distinctive menu options:

View menu
- Document types305

Module window:



6.3.9.2 Fields (Restriction)

Code
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name (the code) of the restriction. This value will appear in the drop-down list associated with the *Restrictions* field of the *Retention Schedule* module.

French Description/English Description
Required alphanumeric fields containing each a maximum of 80 characters.
These fields indicate the description of the restriction both in English and French.

6.3.9.3 Adding or editing a restriction

1. Click on **Customer**->**Restriction** from the *Main window*.
2. Perform one of the following operations :
   - To add a restriction, click on the **Add** button.
   - To modify a restriction, find the desired restriction and click on the **Edit** button when it is displayed on the screen.
3. Enter or modify the code of the restriction in the *Code* field.

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4 Enter or modify the French or English description in the appropriate fields.
5 Click on the **Accept** button when finished.

6.3.9.4 Deleting a restriction

1 Click on **Customer**->**Restriction** from the *Main window*.
2 Find the desired restriction and keep it on the screen, click on the **Delete** button. The system automatically removes the restriction.

Note : A restriction cannot be removed when it is associated to one or many document types. In this case it becomes necessary to remove all the related document types in the *Retention Schedule* 286 module.(See the view the document types associated to a restriction 305 section.)

6.3.9.5 Viewing or printing document types related to a restriction

1 Click on **Customer**->**Restriction** from the *Main window*.
2 Find the desired restriction and keep it on the screen, click on **View**->**Document Types**.
3 The list of document types associated to the restriction appears. This list can be printed by clicking on the **Print** button of the report's window.

Note : Displaying the list of types associated to a restriction can be useful when they have to be retrieved from the restriction (in order to remove the restriction itself.)

6.3.9.6 Viewing or printing the list of all restrictions

1 Click on **Customer**->**Restriction** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. The report is displayed or printed automatically.

6.3.10 Customer Holidays

6.3.10.1 Overview (Customer Holidays)

Entering dates in this module will prevent EDC RC from inadvertently scheduling deliveries when the record center is opened but the customer is not. This is especially necessary for customers that schedule tape rotations. Holidays should be entered at least as far into the future as rotation schedules are entered.

Available reports
- None. (See the *Report* 364 module)

Fields 306 **(see the next section)**

Tasks
- Adding customer holidays 306
- Editing or deleting customer holidays 307.

Distinctive menu options:
None.

Module window:

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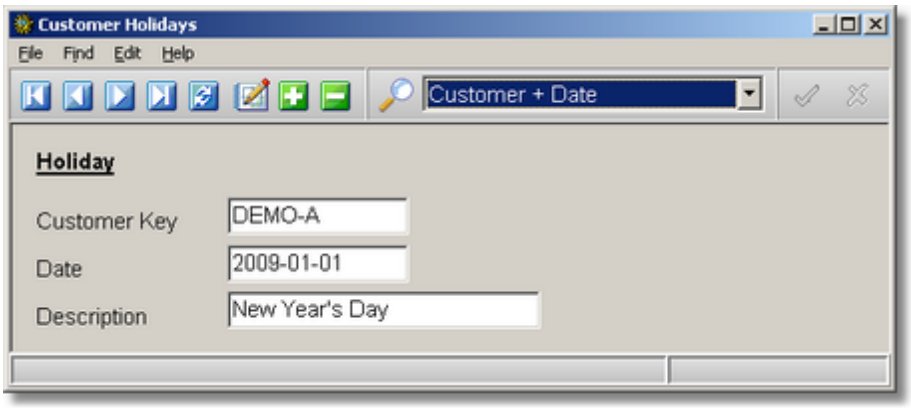


6.3.10.2 Fields (Customer Holidays)

Customer Key
This field allows to identify the customer concerned by the current holiday.

Date
Field with predefined date mask that allows to specify the date for the holiday. The date mask is defined in the *System information* module in the *Date Mask* field.

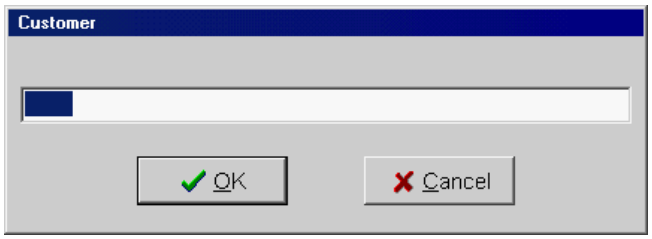
Description
This field allows to clearly identify the holiday. This description generally corresponds to the usual denomination of the day, (example: "Christmas" or "New Year's".)

6.3.10.3 Adding customer holidays

The holiday registered here will prevent tapes from being delivered to the customer on the specified date. The system will consider both customer holidays and record center holidays when calculating delivery dates.

For example, if a customer is closed on December 31st and January 1st, and the record center is closed on the same days, as well as January 2nd. If the customer places a regular order on December 30th, the delivery date for this order will automatically be deferred to January 3rd.

1 Click on **Customer**->**Customer Holidays** from the *Main window*.
2 Click on **Edit**->**Add**. A window appears.



3 Enter the code for the customer in question and press **OK**. The code is automatically displayed in the *Customer Key* field.
4 The cursor is on the *Date* field. Enter the date of the desired day.
5 Move to the *Description* field, enter a summary description for the holiday and press **OK**.

Note : The system allows to enter only one holiday for the same date, even if descriptions are

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different.

6.3.10.4 Editing or deleting customer holidays

1 Click on **Customer**->**Customer Holidays** from the *Main window*.
2 Find the desired holiday and keep it on the screen. Then click on **Edit**->**Edit|Delete**.
3 There are two possibilities :

- When editing a holiday, enter new information in the appropriate fields and press **OK** to register changes.

- When deleting a holiday, a dialog box appears and asks to confirm the operation. To do so, click on the "Yes" button. The holiday is automatically deleted in the system and the date in question becomes a potential delivery date for this customer.

6.4 Inventory Management (Inventory tab)

6.4.1 Outline (inventory)

The inventory management is the main reason for the existence of a record center. That is why the record center must insure a high degree of reliability and a lot of flexibility regarding all the operations related to inventory management. ***EDC*** software was conceived to perform many operations on boxes and files in order to strictly control and manage the inventory. These operations are performed from the modules located under the *Inventory* tab.

Here is a list of the main operations performed on the inventory :

- Editing the inventory 307 of boxes and files
- Performing searches 349 on boxes and files
- Producing activity reports 394 on boxes and files
- Editing internal notes 441 for documents
- Scanning documents 338 and managing scanned images
- Managing storage spaces 376 of boxes and files
- Managing the storage spaces on shelves 387 for files
- Managing shredding container 442 use
- Producing disposal lists 399
- Producing transfer lists 415
- Producing internal transfer lists 434
- Producing deletion lists 427
- Managing the schedules of tapes 357
- Performing Full Text Searches 361 on boxes and files
- Importing and editing customized reports 364

Note : Most of the operations related to the inventory (and also the order processing) are performed with a PDT. The different functionalities of the PDT are detailed in the chapter *How to use the PDT* 104.

6.4.2 Box and File

6.4.2.1 Overview (Box and File)

The *Box* and the *File* modules are documented together, because of extensive similarities in the functions available for managing these two levels of records. These modules enable you to manage and consult information related to boxes and files, perform various functions, and generate many reports.

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Available reports (Box module)

- list of all boxes, either by number or location
  - list of boxes for one customer only
  - by number, by old box number, by description, by owner, by field 1, by field 2, by field 3, by RC location, by entry date, by department or by sub-department
- on department, on sub-department, on activity, on type for a sub-department, on type for a department or on type for all boxes
- list of all boxes that are out for one customer
- inventory completed for one customer
- inventory not completed for one customer
- detailed information of a box

Available reports (File module)

- list of files for one customer only
  - by number, by description, by owner, by field 1, by field 2, by field 3, by entry date, by disposal date, by department, by sub-department or by shelf
  - on department, on sub-department, on activity, on box, on type for a sub-department, on type for a department or on type for all files
- list of files that are out for one customer
- detailed information of a file

Tasks

- Using alternate bar codes to add items and edit them 315
- Finding a box or a file 318
- Editing information related to a box or a file 320
- Viewing the items of an item set 326
- Editing the report options for inventory lists 333
- Viewing or printing the list of all boxes or files 336
- Viewing or printing the list of boxes or files that are out 336

Fields 311 **(see the next section)**

Distinctive menu options:

File menu

- Set Report Options 333
- Print Thermal Labels 328
- Print Laser Labels 328
- Printing Labels by Location 328 (applies to *Box* module)
- Print Box | File Details 337
- Print Imaging Separator images 330 (applies to *File* module)
- Batch Indexing 332
- Images 338 (applies to *File* module)

View menu

- Files (applies to box module) Viewing files within a box 328

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- History Viewing history related to a box or a file 335
- Notes Viewing or editing notes associated to a box or a file 324
- Secondary Notes Viewing or editing the secondary notes of an item 325
- Keywords Viewing and adding keywords 337
- Internal Notes Viewing the internal notes of an item 325
- Alternate Label Viewing or editing the alternate label of a box 338
- Last Order Viewing the last orders of a box or file 338

Find menu

- Find With Bar Code
- Quick Find

Edit menu

- Add PRE ADD 314
- Add PRE ADD Shelf (applies to file module) 314
- Delete PRE ADD Deleting a PRE ADD box 319 / Deleting a PRE ADD file 320
- Notes Viewing or editing notes associated to a box or a file 324
- Secondary Notes Viewing or editing the secondary notes of an item 325
- Alternate Label Viewing or editing the alternate label of a box 338
- Extra Key Words Viewing and adding keywords 337
- Copy and Add Copying and adding a box or file 320
- Change of hands Performing a change of hand for documents that are out 320
- Batch Addition/Edition Batch adding files to the inventory 316
- Transfer to PRE ADD Transferring a file to PRE ADD 323
- Transfer shelf files to box (applies to file module) Transferring an open shelf file into a box 323
- Transfer from box to shelf (applies to file module) Transferring a file from a box to an open shelf 324
- Set Billing Image Password (applies to file module) Password protecting an image for the web 348
- Change box cardboard (applies to box module) Changing the cardboard of a box 321

Box module window

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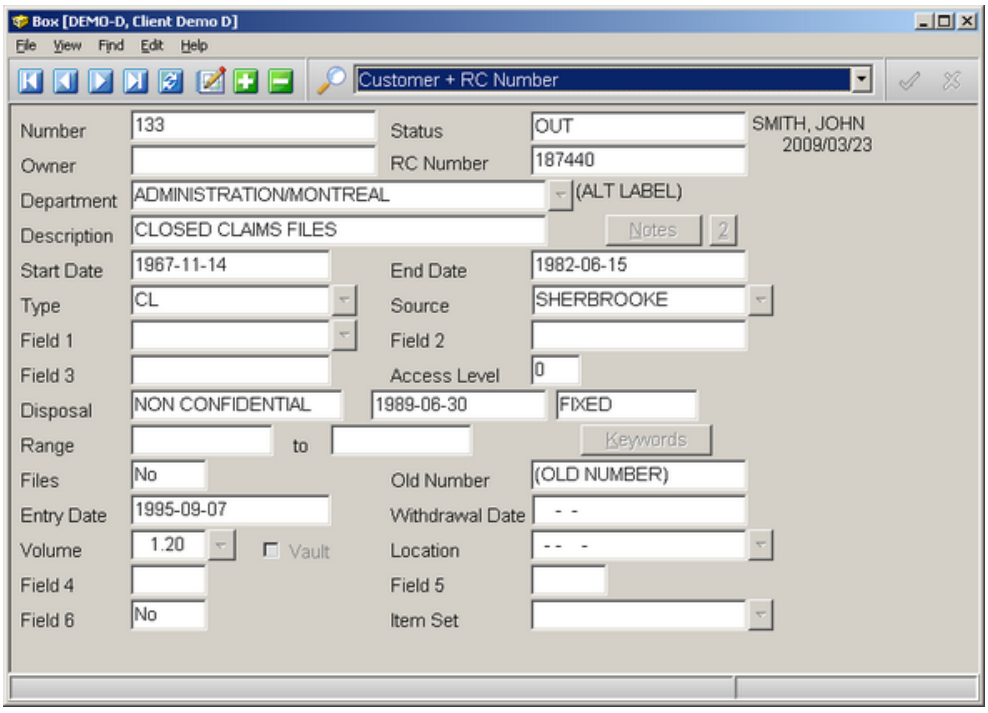
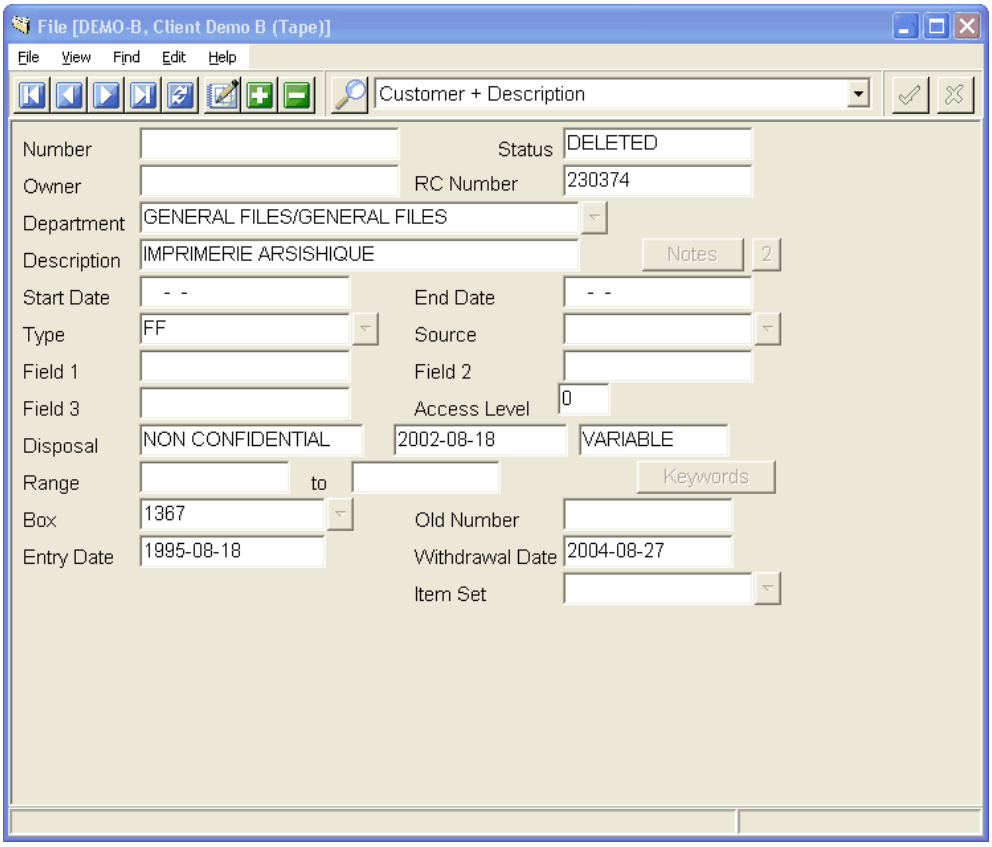


File module window



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6.4.2.2 Fields (Box and File)

Number
Required alphanumeric field containing a maximum of 20 alphanumeric characters.
This field contains the number assigned to the box or the file. The following values are all valid : 100, 100-01-01, TB-00002. To get them sorted numerically (example: 000001, 000002, 000133, ...), it is necessary to right-string numbers with "0"s.

Note : This field is optional for the *File* module.

Status
Read-only field that can take values "PRE ADD", "IN", "SELECTED", "OUT", "TO DESTROY", "DESTROYED", "TO TRANSFER", "TRANSFERRED", "TO DELETE", "DELETED".
This field indicates the current state (activity can also be used) of a box or a file. This field is automatically updated to reflect the operations made on boxes or files.

(If the state of the item is *OUT*, the recipient and the date they received the item are displayed.)

Owner
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the box or the file belongs and is strictly for customer use.

RC Number
Unique read-only numeric field.
This field indicates the number automatically attributed to a box or a file. It is used internally by the system for tracking purposes.

Department
Required drop-down alphanumeric field containing a maximum of 30 characters.
This field indicates to which department and sub-department a box or file belongs to. For example, CLAIMS/CLOSED CLAIMS indicates that the box is in the CLOSED CLAIMS sub-department of the CLAIMS department.

Note : Departments and sub-departments are defined by the *Department* 292 module.
If the customer's conservation policy uses departmental retention, the disposal dates will be determined from the retention associated with the sub-departments. The conservation policy is defined in the *Retention* field 225 of the *Customer Information* module.

(Alternate Label)
The alternate label appears at the right of the department (when applicable).

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the document.

Notes
Optional alphanumeric field containing a maximum of 65 pages of characters (approximate quantity).
To edit this field, use the **Edit**->**Notes** access path (or click on the **Notes** button in the edit mode).

Start Date/End Date
Optional fields with a predefined date format that can be modified (see the *Date Mask* field in the *System Information* module).

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These fields are used to specify the start and the end dates of a box or a file. These fields are useful when the content of a box or a file has been assigned to a specific period of time. The disposal date will be calculated by adding the conservation period to the end date (when it is present).

Type
Required drop-down alphanumeric field containing a maximum of 10 characters.
This field describes the document type of the retention schedule by which a box or a file is controlled. Its value can be edited the same way as the *Department* field.

Note : The document types are defined in the *Retention Schedule* 286 module.
If the customer's conservation policy uses document type retentions, the disposal date will be determined from the retention associated with the document type.

Source
Optional alphanumeric drop-down field containing a maximum of 10 characters (can be dissociated with the drop-down list for the *File* module).
For boxes, this field indicates the location where the box came from before arriving at the off-site record center. For files, this field is reserved for the internal use of the customer and any information can be entered here.

Note : The source locations are defined in the *Source Location* 298 module.

Field 1, Field 2, Field 3
Optional alphanumeric fields containing a maximum of 20 characters each.
The content of these fields can also be defined in the *Customer Information* module (see Defining the box and file fields 258).
These fields are for internal use and can be renamed in the *Dictionary* 190 module. These fields are commonly renamed per customer. It is possible to assign a drop-down list of possible values that will also apply to the web. For more details, see Defining the box and file fields 258

Access Level
Numeric field containing a value between "0" and "9" inclusively.
The access level is used to prevent unauthorized users from editing or ordering boxes with access restriction ("9" is the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box's access level, the user is not allowed to edit or order it.

Disposal
There are three fields related to disposal :

A first choice field containing the values "CONFIDENTIAL 727", "NON-CONFIDENTIAL 727", "NONE 727", "PERMANENT 727", "REVISION 727", "SAMPLE 727" or "SEND TO DEPOT 727". This sub-field indicates the disposal mode used for the concerned document types.

A second sub-field indicating a disposal date for which the format is defined in the *System Information* 195 module.
The box or file will be reviewed on the disposal date. If the disposal is set to "VARIABLE" in the next field, then the disposal date of a document corresponds to the conservation period added to the *End Date* (when present) or to the *Entry Date*;

A third choice field containing the values "FIXED" or "VARIABLE".
If "FIXED" is selected, the disposal date will not be controlled by the customer's conservation policy, but will be the one entered manually in the field. When this field is set to "VARIABLE", the

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revision date will be calculated from either the department's or the document type's retention, depending on the customer's conservation policy. By setting this field to "VARIABLE", any updates to a department or a document type's retention will automatically adjust the disposal date of all the related boxes and files.

Range
Fields possessing a mask defined in the *Interval Mask* field of the *Customer Information* module. Interval of documents contained in a box or a file. This field is reserved for the internal use of the customer.

Files (*Box* module only)
Read-only field that can contain "Yes" or "No".
When this field indicates "Yes", it means that the box contains inventoried files.

Box (*File* module only)
Required drop-down field associated to the list of boxes in inventory. This field appears only for files added in a box
Indicates the box where the file is stored. The box number must correspond to a IN or PRE ADD box when adding files in PRE ADD.

Note : The current module may not be used to transfer a file into a new box. The regular procedure is performed in the *Delivery Return* module and allows to control that a file is properly inserted in the right box.

Shelf (*File* module only)
Read-only field associated to a list defined in the *Open Shelf Location* 387 module. This field appears only for files added on an open shelf.
This field indicates the shelf where the file is stored and is temporarily active and modifiable when the file becomes IN and still do not have a granted shelf.

Note : The current module may not be used to grant a shelf to a file. The regular procedure is performed in the *Delivery Return* module and allows to control that a file is put on the right shelf.

Old Number
Read-only alphanumeric field containing a maximum of 16 characters.
When a box or file number is modified, the old number will be displayed in this field for reference purposes. If the number is changed a second time, then the original number will not be retrievable, at least for searches by old numbers. Effectively, all the old numbers of a document are saved in the document history.

Entry Date
Read-only field with a date mask that can be modified in the *System Information* module.
This field indicates the first date when a box or file was put to PRE ADD in inventory and will indicate later the arrival date of the document at the record center (date when the document became IN).

Withdrawal Date
Read-only field with a date mask that can be modified in the *System Information* module.
This field indicates the date when the box or file has been removed from the inventory (date when the document became DELETED, DESTROYED or TRANSFERRED).

Volume (*Box* module only)

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Drop-down field associated to a list defined in the *Box Type* module.
This field allows to select a volume for the current box, in accordance with the box type chosen from the list. Sometimes, the volume of a box type does not correspond exactly to the volume of the box location. It depends on customer and general settings (*Volume Equivalence, Box* field in the *Customer Information* module and *Bypass volume check* field in the *System Information* module).

Note : When a box is added in PRE ADD to the inventory, it is not necessary to enter a volume (associated to a box type) for that box. When boxes are sent to the record center, the system automatically attributes them the volume of the location where they are returned.

Vault (*Box* module only)
This box can be checked off to indicate that the box must be stored in the vault. This will have an effect when the box location will be chosen.

Location (*Box* module only)
Required alphanumeric field that can contain up to 20 characters.
This field indicates the storage location of the box within the record center. The locations are defined in the *Location* module.

Field 4 and 5 (*Box* module only)
Optional alphanumeric fields containing a maximum of 4 characters each.
These fields are for internal use and can be renamed in the *Dictionary* 190 module.

Field 6 (*Box* module only)
Choice field that can contain "Yes" or "No".
This field is for internal use and can be renamed in the *Dictionary* 190 module.

***Item Set**
Drop-down field associated to a list defined in the current module.
This field allows to associate an item to an item set. When one item associated to an item set is ordered, all the available items associated to that set are automatically ordered by the system.
To associate an item to an item set, simply select an item set in the drop-down list or add a new set manually by entering a description.

Note : It is possible to associate the files of a box to different sets, even if none of these sets is the same as the box set. When a file is ordered in a box and the box is not granted to the same set, only that file and the other files of the same set are added to the order. Nevertheless, when a box is ordered, all the files into that box are ordered indiscriminately.

6.4.2.3 Adding a box or a file to the inventory

The Box and File modules can be used to add new documents in PRE ADD to the inventory.

Documents can also be added directly to the IN state, but this operation is not recommended. It would be better to use the regular procedure in the Delivery Return module, in order to control that these documents are properly added to the right location (box or shelf.)

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **Edit->Add|Add PRE ADD|Add PRE ADD Shelf** (files only). A window appears.

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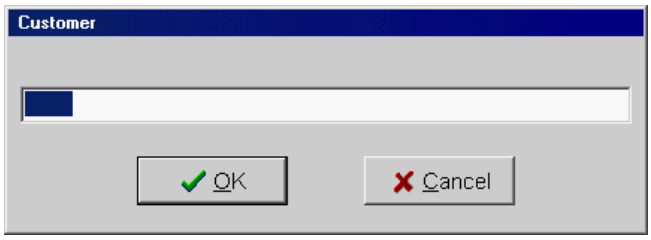


3. Enter the code of the desired customer and press **OK**.
4. Enter the required information in the appropriate fields (see the previous section 311 for more details).
5. Click on the **Accept** button to register the additions.

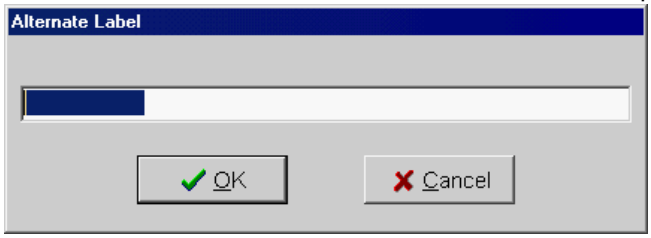
6.4.2.4 Using alternate bar codes while adding and editing items

You or your customers may wish to make use of barcodes that were created in other systems, in order to avoid the effort of applying new labels. These labels may be associated with the items in EDC by assigning them as *Alternate Labels*.

Note : Two items in belonging to the same account may not have the same alternate label. If items in different accounts share an alternate label, it will not be possible to move this item with the PDT using the alternate label, since the system will not know which item was moved. (Internal transfer lists and refile lists may be used instead, as these do specify the item.)

Edit or associate an alternate label to an inventoried item

1. Open the **Inventory->Box|File** module.
2. Navigate to the desired item.
3. Press **F5**, or select **Edit->Alternate Label**. A window appears.



Note : If an alternate bar code is already associated to the item, it appears in the window. The new alternate bar code entered replaces the old one.

4. Scan or type the alternate bar code and press **OK**. (This may be done using a bar code scanner attached to the computer.)

Associate a pre-printed alternate bar code to a new item

This operation consists in putting pre-printed alternate labels onto new items and scanning the alternate bar codes when the items are added to the inventory in PRE ADD.

1. Click on **Inventory->Box|File** from the *Main window*.
2. Click on **Edit->Add PRE ADD|Add PRE ADD shelf** (File only). A window appears and allows to choose a customer.
3. A dialog box asks if a label is to be printed for each item. Click **No**.
4. Select the customer by entering the customer key or selecting from the list.
5. Enter the desired information in the appropriate fields (see the Fields 311 section for more details) and click on the **F5** key. A window appears.

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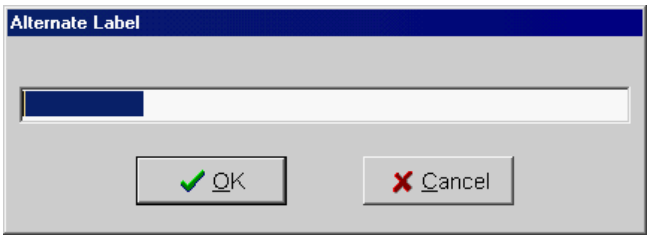
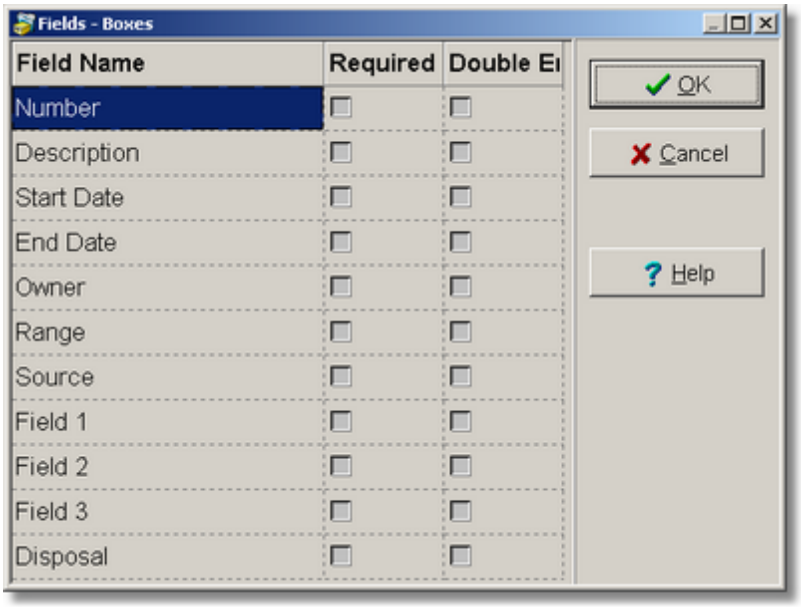


6. Scan or type the bar code of the alternate label and press **OK**. Click the **Accept** button of the module's window to approve the addition of the item.

6.4.2.5 Batch adding boxes or files to the inventory

This operation adds boxes or files to inventory in batch for the same customer, department, and document type. It prompts you to enter information for the additional fields that you specify. Note that boxes can also be added in batch on a return 556, in which case an accessin fee will be applied.

1. Click on **Inventory->Box | File** from the *Main window* and select **Edit->Batch Addition\Edition** from the menu.
2. Select the customer to whom the boxes belong, either by entering the customer key, or pressing enter to select from a list.



Note: When the double entry checkbox is selected beside a field, one will have to enter the data twice in each field that is required.

3. Check off the fields for which a value must be entered and press **OK**. A third window opens on the screen.

Note: If *Disposal* is selected, the disposal calculation will be set to fixed date, which you will be prompted to enter. The disposal mode will be taken from the document type (applies to boxes).

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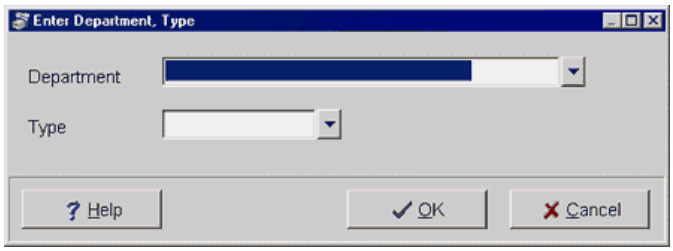
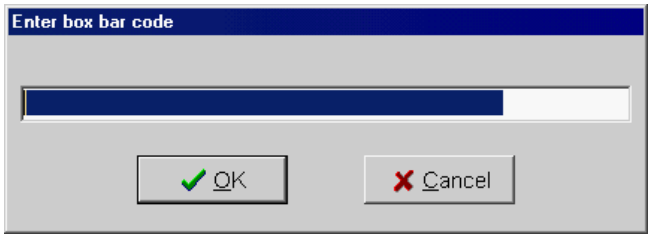


4. Enter a department and document type for the new files or boxes (use the choice buttons to choose a value in the list) then click on the **OK** button.
5. A dialog box asks "Are the labels pre-printed?". If the files or boxes have already been created and have a bar code, click **Yes**. If not, click **No**.

For files:

- The system prompts, "When the box is IN, would you like the files in the IN state? (otherwise the state of the files will be PRE ADD)". Press **Yes** to create the files IN, **No** to create them in PRE ADD.

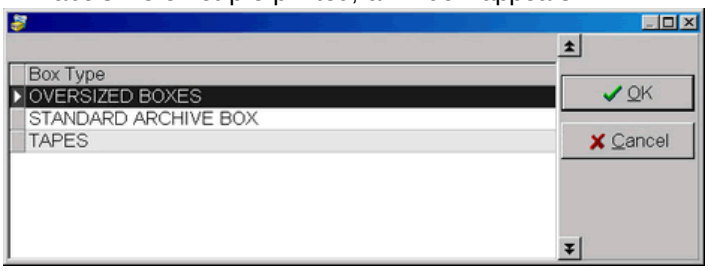


- Scan or manually enter the barcode of the box where the files will be stored and press **OK**.
- If file labels were pre-printed, scan or manually enter the file bar code.
- Enter the values for required text fields
- Repeat, then click the **Cancel** button when finished with files for this box.
- The system prompts."Continue to use the same Department and Document Type shown above ?". Click **Yes** to enter more files in another box for the same department and document type, **No** or **Cancel** to exit.

Note: The files can only be added into boxes whose state is IN, OUT or PRE ADD.

For boxes:

- If labels were pre-printed, scan or manually enter the box barcode.
- If labels were not pre-printed, a window appears



- Choose a box type (it will appear highlighted) and press **OK**. A window appears :

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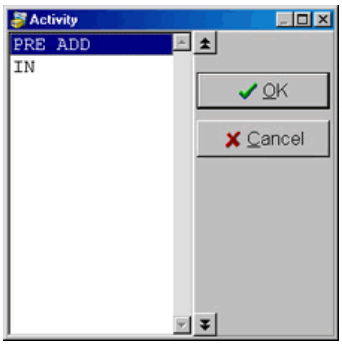
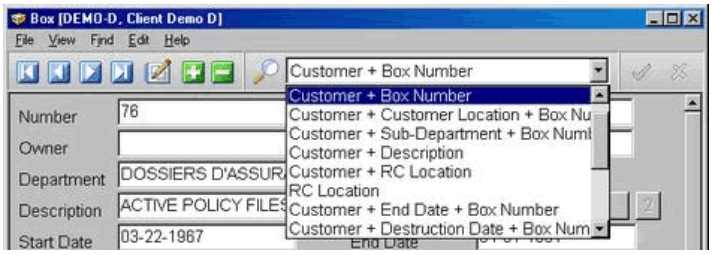


- Select the correct state and press **OK**
- If boxes are *IN*, select the transit location and press **OK**.

A window will appear for every required field and allows to enter the desired values. Proceed as many times as necessary and click on the **Cancel** button when finished. The boxes are automatically added to the inventory as specified.

6.4.2.6 Finding a box or a file

1. Click on **Inventory**->**Boxes|Files** from the *Main window*.
2. Choose how the item will be searched by selecting a search index 727 in the button bar as follows.



3. Click on **Find**->**Find**. A window appears and allows to specify which customer is concerned.
4. Enter the code of the desired customer and press **OK**.

Note : Only the fields of the chosen search index are active and allow to enter data.

5. Enter the desired information in the appropriate fields and click on the **Accept** button. The system displays the searched item or the item for which its information are most similar with the ones previously entered.
6. If the searched item is near to the one displayed on the screen, it is possible to find it by scrolling the list of all the items. Click on **Find**->**Scroll** to do so. A window appears.

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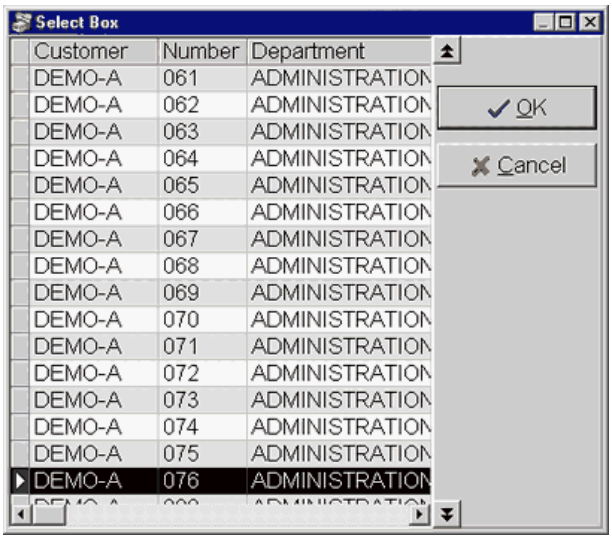


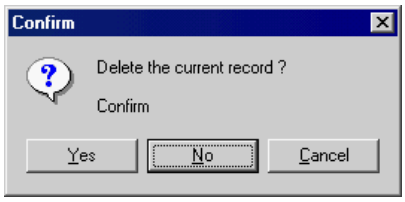
Note : The highlighted item is the one found in **5**.

7 Scroll the list with the scroll arrows and double-click on the searched item when it is displayed in the window (or press **OK)**. The system goes back to the main window of the module and displays the selected item. It then becomes possible to consult the information of this item and to edit its information.

6.4.2.7 Deleting a PRE ADD box

Only the documents in PRE ADD can be deleted from the system in the *Box* and *File* modules. The operation is irreversible and deletes the item, its notes and history. All this information can never be recovered after the confirmation of the deletion.

1 Click on **Inventory**->**Box** from the *Main window*.
2 Search the desired box (see "Finding a box or a file 318").
3 When the desired item is on the screen , click on **Edit**->**Delete pre add**. A dialog box appears.



4 Click on the **Yes** button to confirm the deletion.

Note : An error message sometime appears when deleting an item with the current operation.

In order to maintain the integrity of the inventory, items that were mistakenly put to the IN

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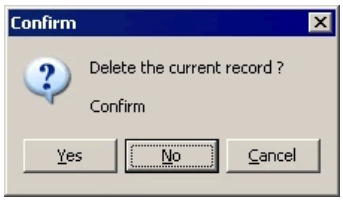
state can be transferred to the PRE ADD state. To finally delete these items, it is then necessary to open the *Remove PRE ADD* module.

There is an operation, completely different from the current, that allows to transfer an OUT item to DELETE. This operation is performed through the creation of a deletion list in the module of that name. The documents are not deleted from inventory, they are only marked as deleted and the storage fees related to these documents are cancelled. These documents can be reactivated later and it is possible to recover all the history and notes before their deletion.

6.4.2.8 Deleting a PRE ADD file

This allows the deletion of PRE ADD files that will not be used.

1. Click on **Inventory**->**File** from the *Main window*.
2. Click on **Edit**->**Delete PRE ADD**. A message appears.



3. To confirm press **Yes**, to abort the operation press **No** or **Cancel**.

6.4.2.9 Editing information related to a box or a file

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Search the desired box or file (see "Finding a box or a file 318").
3. When the desired item is on the screen click on **Edit**->**Edit**.
4. Modify the desired information in the appropriate fields (see "Fields 311" of the current module for more details)
5. Click on the **Accept** button to save changes.

6.4.2.10 Copying and adding a box or file

This operation allows to copy all the information of a box or file (description, department, type, etc.) and grant them to one or more PRE ADD items newly added to the inventory.

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Search the desired box or file and keep it on the screen (see "Finding a box or a file 318").
3. Click on **Edit**->**Copy and Add**. The system automatically creates a new PRE ADD item.
4. Press **OK** to save the new item. A second item is created, similar to the one previously. Press **OK** again, in order to accept this second addition, or click on the **Cancel** button to terminate the operation.

Note : When copying boxes, the number of new items has to be changed because two boxes cannot have the same number.

6.4.2.11 Performing a change of hand for documents that are out

This operation allows to change the name of the person that has called back a box or a file from the inventory. The changes will appear in the history of the document.

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Search for the desired box or file and keep it on the screen.

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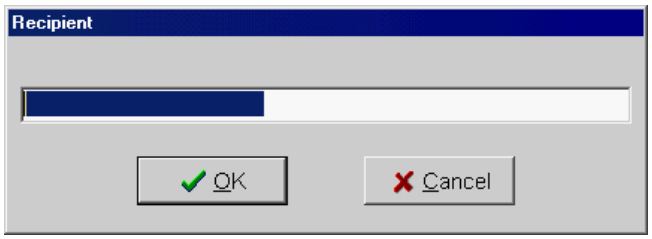
3 Click on **Edit**->**Change of hands**. A window appears.



4 Enter the desired name and press **OK**. The name entered here will appear in the document history and will indicate that a change of hands was performed. The name of the original recipient will still appear in the history.

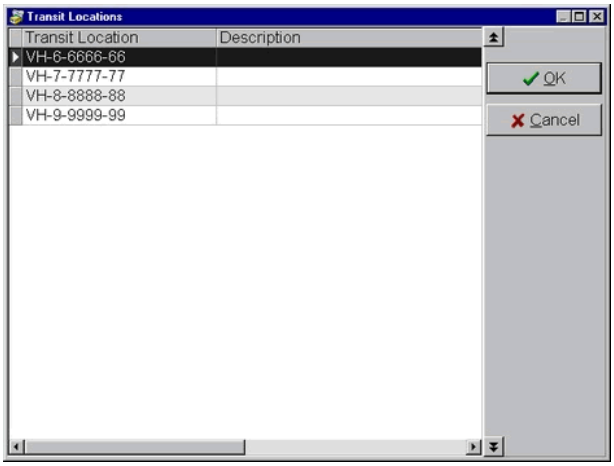
6.4.2.12 Changing the cardboard of a box

This operation allows to register the change of the box's cardboard in the system. It will automatically bill the new box container and print a new label.

Take note that a box cardboard change can also be performed when a box is returned to the Record Center via the Return Delivery 554, as well as in the Delivery Billing 617 module.

The only difference between the current cardboard change and the one in the *Return Delivery* module is that in the last case, the box must be returned to the RC for the change to be performed, thus the box retrieval rate will not be charged.

1 Click on **Inventory**->**Box** from the *Main window*.
2 Click on **Edit**->**Change box cardboard**. A window appears.



3 The system requests the user to specify the transit location where the boxes are located after being pulled from the shelves. Select the desired transit location (it will appear highlighted) and press **OK**. A window appears.

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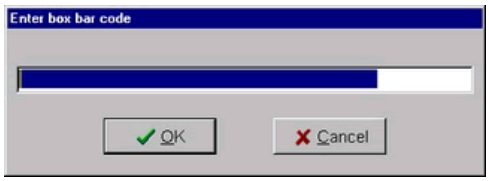

4 Enter the box's bar code (or scan it with the wedge scanner) and press **OK**. The thermal label will automatically be printed. Repeat the operation as many times as needed and press **Cancel** when you are finished.

Note: The system will give you an error if a delivery type as not been set as default in the Box Chg. Delivery Type 201 field of the *System Information* module.

A "box change" history is added to each box with the name of the employee that performed the box change. Each box is moved to the transit location specified by the user. A single order and delivery is created for all boxes scanned per customer.

The delivery is in the *Returned* state, to allow the boxes to be refiled using the standard procedures.

If the box change of a box is found to be billable (see the Min.Touches Box Chg.Charge 231 field in the *Customer Information* module for more details), it has the following charges:

The delivery/order has 3 charges for each box:
- a charge for the retrieval
- a charge for the archive box change (by default the BCHG price code)*
- a charge for the refiling

On the delivery return, each box is added, so a refile is charged for each box.

***Note:** The system will only use the BCHG price code when performing this operation. The price for this code can be defined in the General Pricing 632 module.

If different box types are used at your record center and you want to charge different prices for each type, here is how you can bill your clients :

1) Edit the charges in the delivery billing module every time the BCHG price code appears. Take note that this option might be very time consuming especially if you have many customers that each use different box types.

2) Give the BCHG price code a 0$ price. Keep track of all the times the BCHG price code is applied for a said period (week, month, year) and add a periodic invoice item for this customer. A price code will also need to be added to the *General Pricing* module for each periodic invoice item you want to add, ex: price code B300 for boxes with a 3.00 cubic feet volume and price code B240 for boxes with a 2.40 volume.

3) Give the BCHG price code a 0$ price. Keep track of all the times the BCHG price code is applied for a said period (week, month, year). Add a price code for all box types, each line item being a

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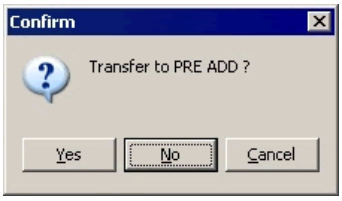
different price code for different box sizes and specifying Yes in the Line Item field.
Ex: Price code C100, C200 and C300 are added (as line items) for the price of the change.
Create an order for each customer with the amount of changes for each box type.

Note: One can create a report in the SQL report builder 364 to keep track of the BCHG price code.

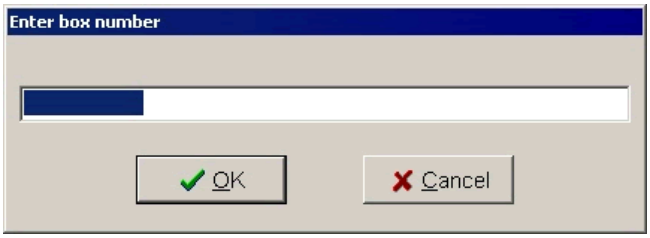
6.4.2.13 Transferring a file to PRE ADD

This operation allows to transfer a file (in a box) from the DELETED state to the PRE ADD state (into a box).

1 Click on **Inventory**->**File** from the *Main window*.
2 Click on **Edit**->**Transfer To PRE ADD**. A window appears.



3 To confirm press **Yes**, to cancel press **No** or **Cancel**.
4 If you pressed **Yes**, a window appears.



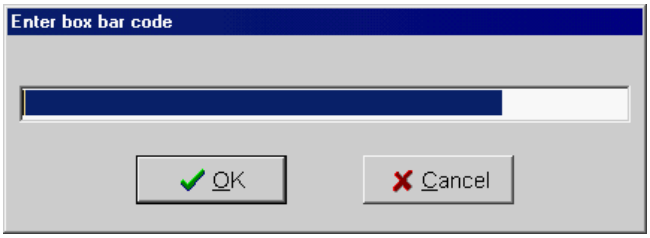
5 Enter a box number (to have the list of boxes press **OK**, select a box and it will appear highlighted) and press **OK**.

Note: The box must be OUT or in PRE ADD.

6.4.2.14 Transferring an open shelf file into a box

This operation allows to transfer a file from the IN state (on open shelf) to the PRE ADD state (into a box).

1 Click on **Inventory**->**File** from the *Main window*.
2 Click on **Edit**->**Transfer Shelf Files to Box**. A window appears.



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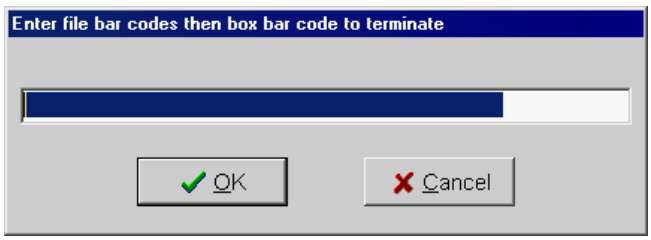
3 Scan or enter the box bar code where the files will be transferred and press **OK**. The box must be in PRE ADD. Another window appears.



4 Scan or enter one after the other the bar codes of the files that are transferred and press **OK** after each file. When the last file has been added, scan or enter the box's bar code again. The window opened in **2** reappears and allows to repeat the operation for another box. Proceed or click on the **Cancel** button to terminate the operation.
5 All the related files now appear in PRE ADD; they could be put in the IN state when the box where they were transferred will be returned to the record center.

6.4.2.15 Transferring a file from a box to an open shelf

This operation allows to transfer a file from a box to an open shelf

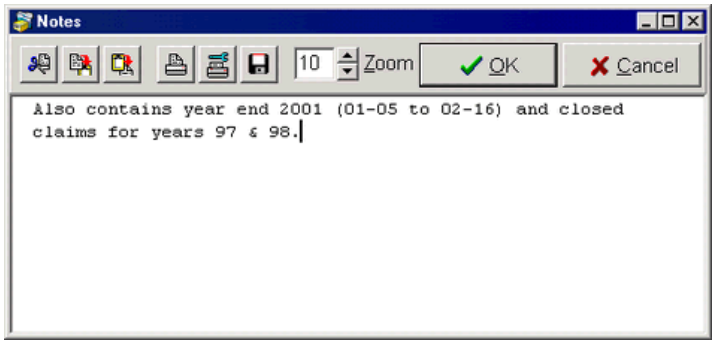
1 Click on **Inventory**->**File** from the *Main window*.
2 Click on **Edit**->**Transfer From Box to Shelf**. A window appears.

3 To confirm press **Yes**, to cancel press **No** or **Cancel**.

Note: This operation can also be done with the PDT (see Moving items 108)

6.4.2.16 Viewing or editing notes associated to a box or a file

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired box or file (see "Finding a box or a file 318").
3 When the desired document is on the screen, click on **View**->**Notes** or on **Edit**->**Notes**. A window appears.



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Note : This window is the one displayed when editing notes. When viewing notes, some buttons are not displayed or disabled.

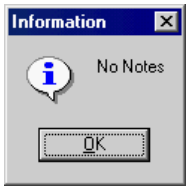
4 Edit the notes and click on the **Accept** button to save changes or click on the **Close** button when finished viewing notes.

Note: This operation will appear in the history of the box as a "general change", if the notes were modified.

6.4.2.17 Viewing the internal notes of an item

The internal notes of a box or a file are defined in the *Internal Note* 442 module. These notes explain internal operations and can never be viewed by the customers.

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired document and keep it on the screen, then click on **View**->**Internal Notes**. When the case arises, a report window appears and displays the internal notes for the document in question. When no internal notes have been defined for that document, the following box appears.



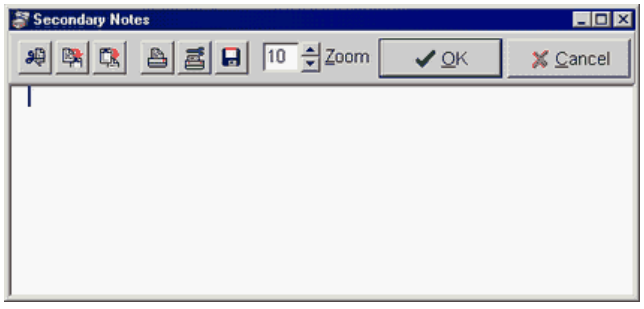
3 Click on the **Close** button of the report window or on the **OK** button of the information box to end the operation.

6.4.2.18 Viewing or editing the secondary notes of an item

The secondary notes are viewable at the record center and in the customer version of ***EDC***. They are replicated as any inventory data. They are dissociated from the regular notes of the item (*Notes* 311 field in the *Box* and *Files* modules) but have the same function.

Adding secondary notes to an item

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired item and keep it on the screen, then click on **Edit**->**Secondary Notes**. A window appears.



3 Enter the desired notes and press **OK**.

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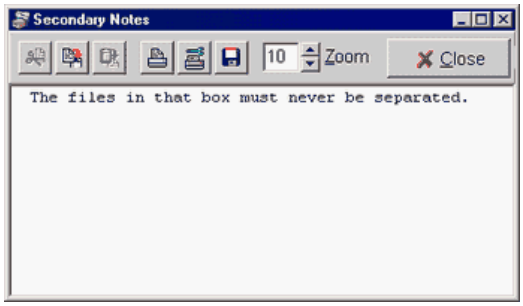
Viewing the secondary notes of an item

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired item and keep it on the screen, then click on **View**->**Secondary Notes**. When secondary notes have already been defined for the item, a window appears.



Note : When no secondary notes have been defined for the related item, a message appears in order to advise the user.

3 Click on the **Close** button to end the viewing.

6.4.2.19 Adding items to an item set or viewing items of item set

For more details about item sets, see the *Item Set* 314 field in the *Box* and *File* modules.

Creating an item set

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and enter a name for your item set in the drop down field.
3 When all the changes have been performed for that item, click on the **Accept** button. The item set you have created will automatically be added to the list.

Adding an item to an item set

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and click on the drop down button located to the right of that field. A window appears.

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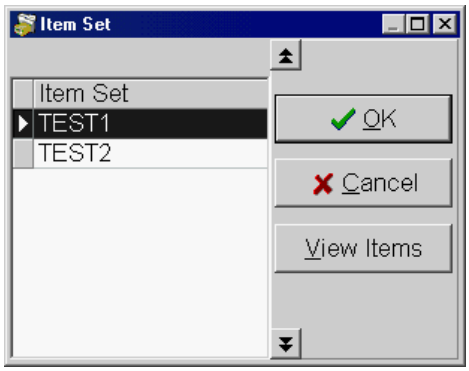
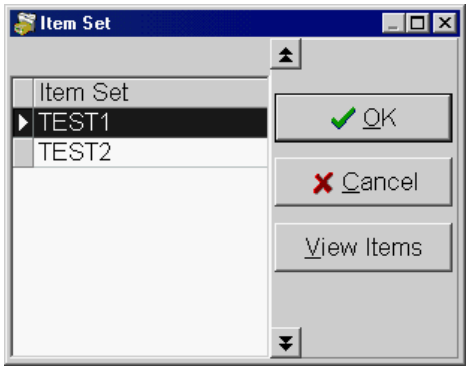


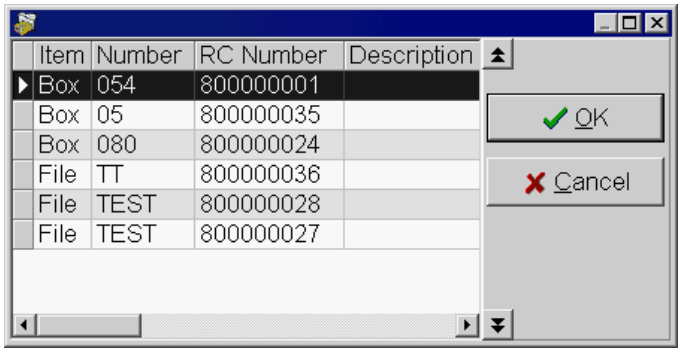
3 Select the item set of your choice, and press **OK**.
4 When all the changes have been performed for that item, click on the **Accept** button.

Viewing items of an item set

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and click on the button located to the right of that field. A window appears.



3 Select an item set whose items must be viewed (it will appear highlighted) and click on the **View Items** button. Another window opens.



4 This window displays the list of all the items associated to the item set. Click on the **OK** button to end the viewing and to go back to the window opened in **2**.
5 If desired, repeat the operation for another item set or click on the **OK** button to have access to

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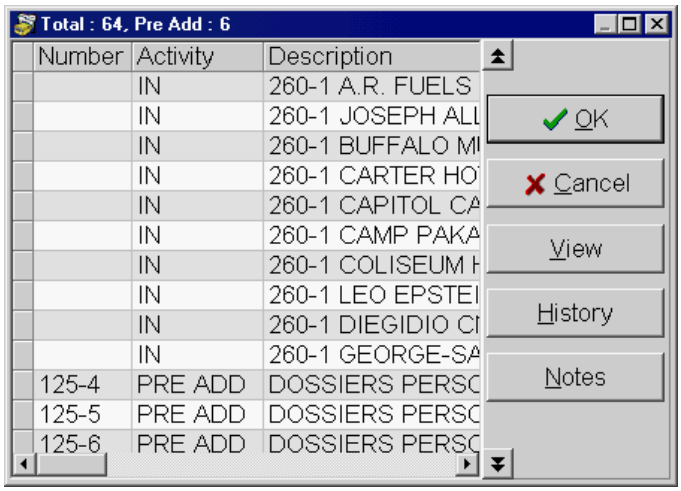
the other fields.

6.4.2.20 Viewing files within a box

From the *Box* module

1 Click on **Inventory**->**Box** from the *Main window*.
2 Search the desired box (see "Finding a box or a file[318]").
3 When the desired box is on the screen click on **View**->**Files**. The list of the files contained in the box appears.



4 Press **OK** when finished.

Note : The **View**, **History** and **Notes** buttons allow respectively to view the details of the selected file (highlighted), its history or its notes.

From the *File* module

1 Click on **Inventory**->**File** from the *Main window*..
2 Search a first file for the desired box (see "Finding a box or a file[318]") by selecting the search index "Customer + Box".
3 The module displays the first file contained in the selected box. To view the other files within that box, simply navigate with the button bar[24] or use the navigation shortcuts[25].

6.4.2.21 Printing bar code labels

Normally, the bar code labels for new documents are printed when they are sent to (returned) and added in inventory at the record center. This operation is performed in the *Delivery Return* module. These labels and their parameters are an internal part of the software and are printed on a thermal printer, but one of the available format can be chosen from the *Main window* or the *System Information*[197] module.

For many reasons it can be necessary to reprint some of these labels. It is possible to do it from here.

Printing a thermal label

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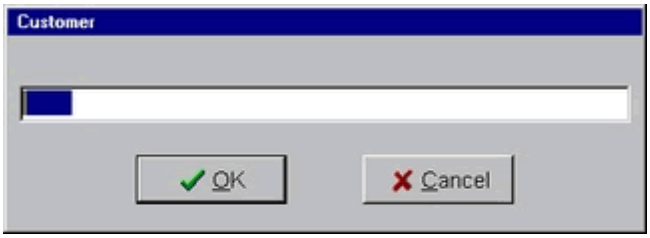
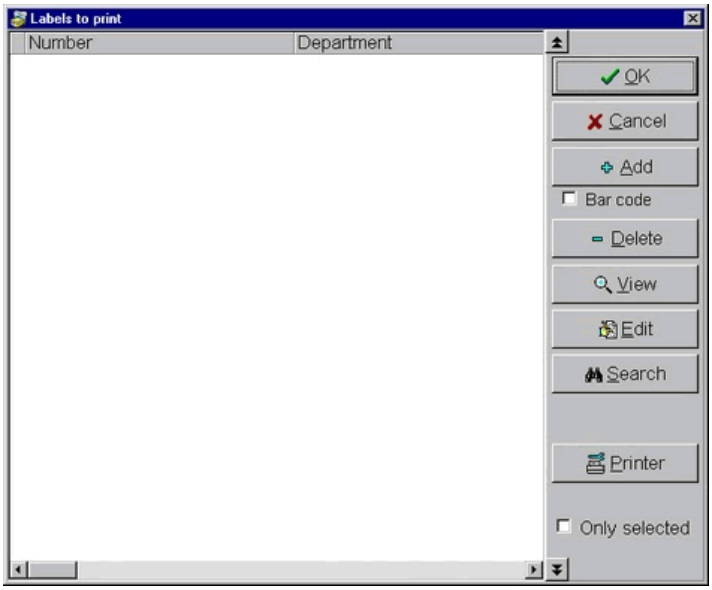
1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired box or file (see "Finding a box or a file 318").
3 When the desired item is on the screen click on **File**->**Print Thermal Label** or simply press **F7** . The label is automatically printed on the thermal printer of the workstation.

Printing many thermal / laser labels

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Click on **File**->**Print Thermal/Laser Labels**. A window appears.



3 Enter the customer code and press **OK**. A window appears.



4 Perform a search for the boxes/files you want to print labels for, or simply add the boxes you want to print in the list. Press **OK** when all the boxes or files you want are on the list.

5 If you are printing boxes, the system asks if you want to print the files' labels as well. Press *Yes* to print them, and *No* or *Cancel* to print only the boxes' labels.

6 If the thermal label option was chosen, the labels will print automatically after this. When printing laser labels, if a customer has another label template 264 available (other than the defaults for files and boxes), the following window will appear :

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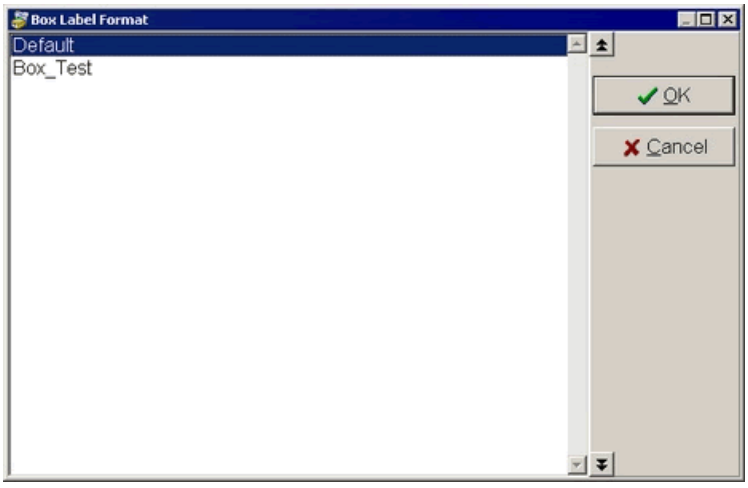
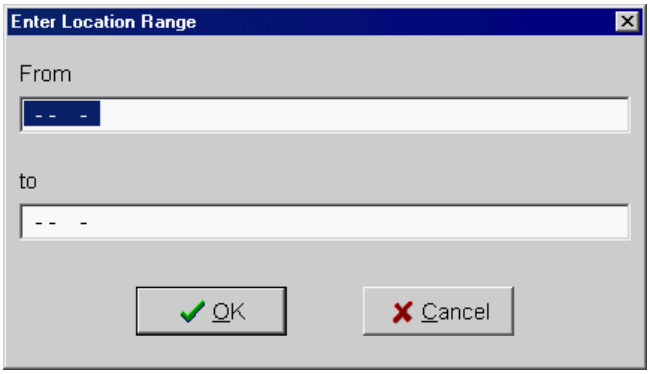


7 Select a label template in the list and press **OK**. The labels are printed automatically on the default or selected printer.

Printing labels for specific locations (*Box* module only)

1 Click on **Inventory**->**Box** from the *Main window*.
2 Click on **File**->**Print Labels By Location**. A window appears.



3 Enter an interval of locations and press **OK**. The labels of the boxes stored in these locations are automatically printed.

6.4.2.22 Printing Imaging Separator Pages

Images can be imported efficiently into EDC if they are named after the barcode of the file. (See the topic Importing Images 496).

To accelerate the scanning and naming of multiple files, EDC can print an imaging separator page to place before each physical file. These files are then scanned as a single batch, and then processed using inexpensive third-party software for import into EDC. (See knowledge base article KB00145 at client.docudatasoft.com for instructions.)

To print imaging separator pages:

1 Click on **Inventory**->**Box** from the *Main window*.

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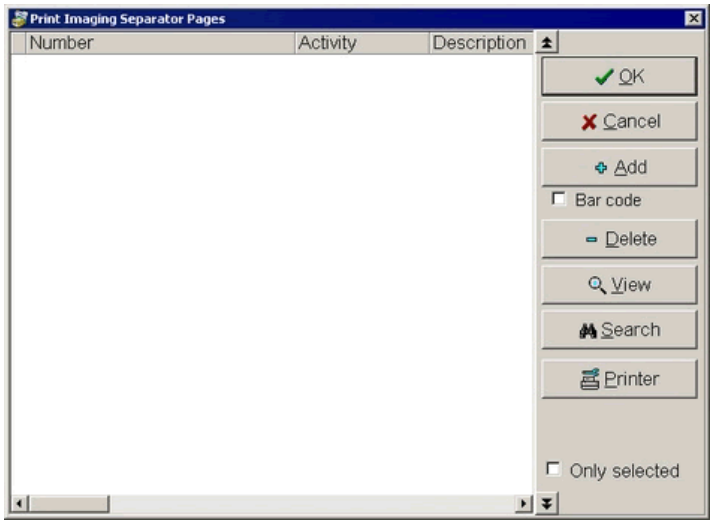
2 Click on **File**->**Print Imaging Separator pages**. A window appears.
3 Enter the customer key or click on **OK** to have the list of customers (select a customer - it will appear highlighted - and press **OK**). Press **OK**.
4 A window appears.



5 To add a file, press **Add**.
6 A message appears: "Select by description?" Press *Yes* to accept, press *No* to select by number or press *Cancel* to abort the operation.
7 Enter the file number and **OK** to select the starting point of the list or press **OK** to have the list of files.
8 To delete a file from the list, select the file (it will appear highlighted) and press **Delete**.
9 When the list is complete, press **OK**. The bar codes of the files will automatically be printed on the laser printer.

EX:

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```
File   0-65-6-43 INS CO OF N.A

Customer            : DEMO-C
Status              : IN
RC Number           : 231302
Description         : 0-65-6-43 INS CO OF N.A
Department          : CLAIMS/CHICAGO
Type                : CL
Start Date          : 1974/03/15  End Date 1974/03/15
Disposal            : Non Confidential  1980/03/15  Variable
Owner               :
Source              :
Field 1             :
Field 2             :
Field 3             :
Range               :  to
Old Number          :
Access Level        : 0
Entry Date          : 1995/08/24
Withdrawal Date     :     /  /
Box                 : 37
Location            : VH-9-0101-12
```

6.4.2.23 Batch indexing

Batch indexing updates the index used by the *Full Text Search* for the specified records.(see Setting up a customer to use Full Text Search at RC 86 in the *Procedures* module in the manual.) When batch indexing one or many boxes, the software will not index the boxes' files. (You can index files and images through the file module.) Batch indexing may take a while, and could possibly slow down EDC for all users (it is better to do a batch indexing during less active periods.)

Batch indexing

1. Open the **Inventory->Box** module.
2. From the menu, select **File->Batch indexing->(With Search | By RC number).** For files you have the option of indexing files, or the images that the files contain.
3. Choose a customer (to have the list of customers press **OK**, select a customer --- it will appear highlighted)

By RC number

A window will appear

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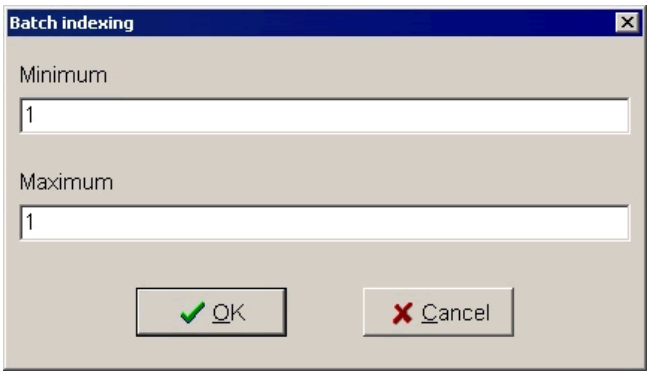
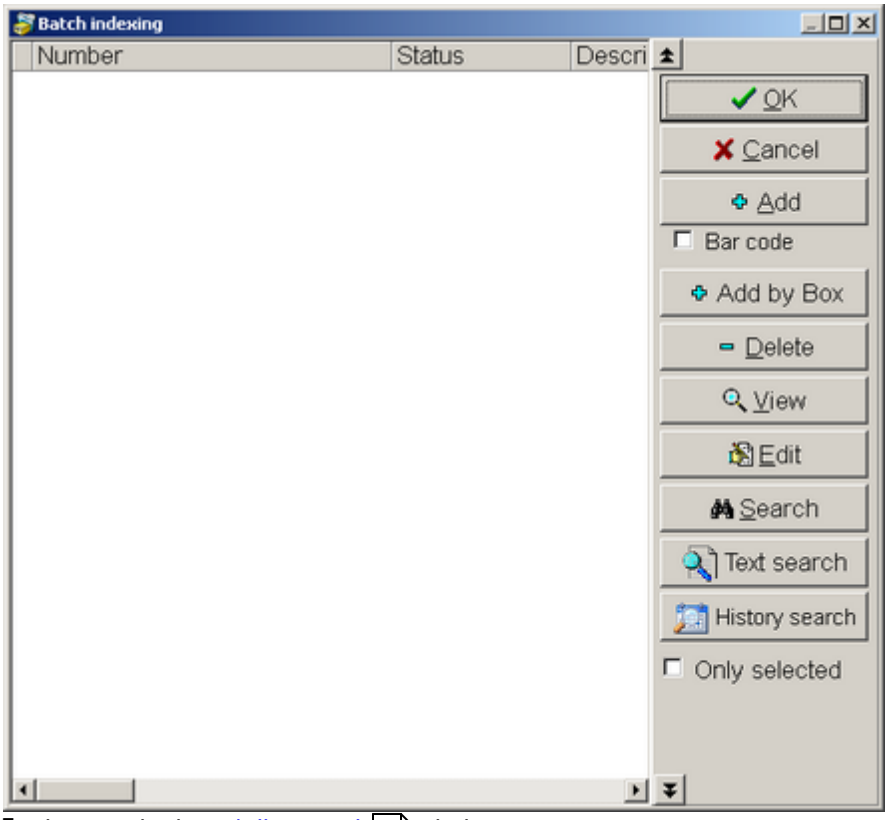


4. Choose a range of RC numbers to index. Press **OK**. The system will index the specified items.

With search



5. The standard Box|File search 351 window appears.

- Use the buttons to the right to build a list of items to index.
- To delete certain items from the list select one or many items (they will appear highlighted) and press the Delete button.
- If the "Only selected" box is checked, only those items highlighted in black will be indexed.

6. When the list is complete press **OK** again (the software will index the content of the files and boxes chosen)

6.4.2.24 Editing the report options for inventory lists

The reports of boxes and files are generally pre-defined in the System Information 217 and Customer Information 271 modules and one report is set as the default report.

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But for every inventory list produced from the Box or File module, it is possible to choose the desired pre-defined report and also to modify the information that will be displayed on the list. These modifications are not saved in the system and are lost as soon as the Box or the File module is closed.

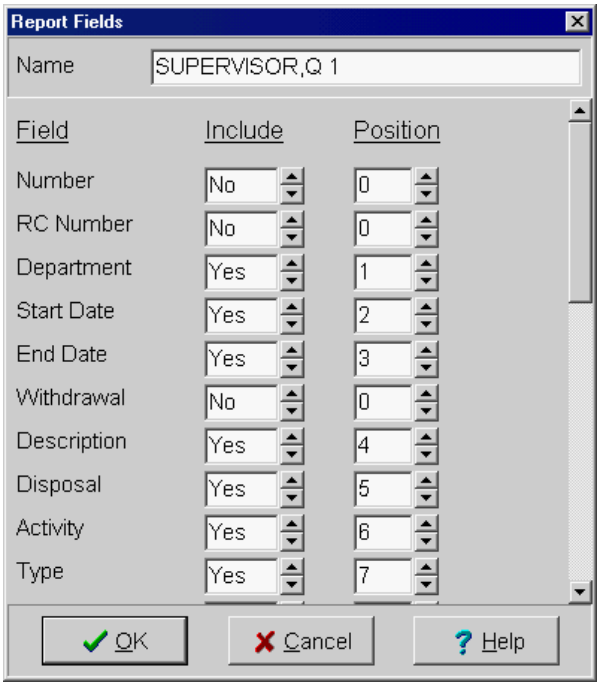
Select a report to produce an inventory list

1. Click on **Inventory->Box|File** from the *Main window*.
2. Click on **File->Report Options->Box|File (Box module)->Select Predefined Box Report| Select Predefined File Report** . A list appears and displays all the reports predefined in the system.
3. Select the desired report (it will appear highlighted) and press **OK**. The system goes back to the module's window.

Edit the information of the chosen report

Consider that the Box or File module is opened and that a report has already been selected (previous operation).

1. Click on **File->Report Options->Box|File (Box module)->Modify Box Report Fields|Modify File Report Fields**. A window is displayed.



2. Click on the **choice buttons** of the Include column and set the desired fields to *"Yes"* or *"No"* if these fields must appear or not on the report. For all the fields that are set to *"Yes"*, click on the choice button in the Position column and set their display order. Press **OK** to terminate the operation. The system goes back to the module's window.

Every inventory list viewed or printed after the current operation will only display the information chosen in 2.

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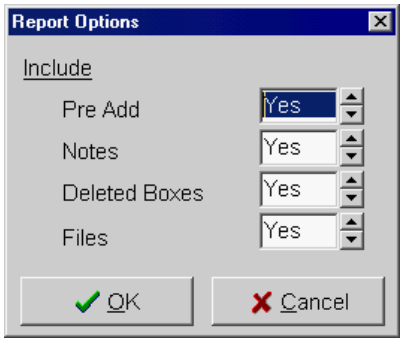
Select specific report options

This operation allows to specify if documents in a particular state must be included on the report and also some specific information.

1. Click on **Inventory->Box|File** from the *Main window*.
2. Click on **File->Report Options->Report Options**. A window appears.

For boxes :

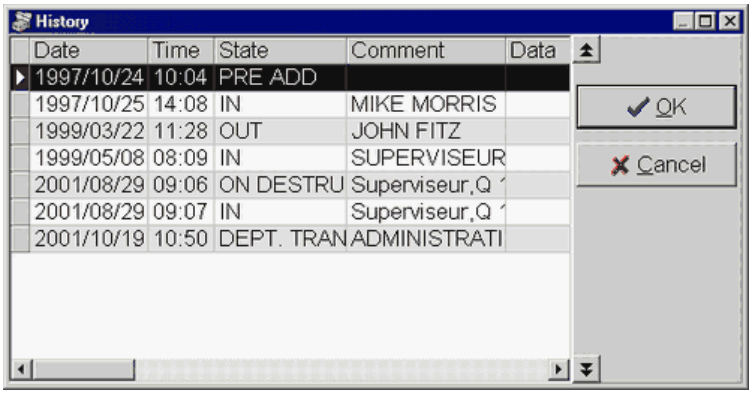


Pre Add allows to include the PRE ADD boxes on the report.
Notes allows to include the notes of the boxes on the report.
Deleted Boxes (or *Deleted Files*) includes the DELETED items on the report.
Files (applies to boxes only) includes the files contained in the boxes on the report.

3. Use the **choice buttons** to set the desired options to "*Yes*" or "*No*" and press **OK**.

6.4.2.25 Viewing history related to a box or a file

1 Click on **Inventory->Box|File** from the *Main window*.
2 Search the desired box or file (see "Finding a box or a file 318").
3 When the desired item is on the screen click on **View->History** or press **F3**. The report window appears.



4 Press **OK** to end the viewing.

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6.4.2.26 Viewing or printing a list of boxes or files

From the *Box* module

1. Click on **Inventory**->**Box** from the *Main window*.
2. Click on **File**->**View Report**|**Print Report**->**All Boxes**|**Customer Only**, and select one of the available sub-menus.
3. According to the chosen menu option, enter the requested information in the windows that are displayed consequently. The related report will be printed or displayed soon after.

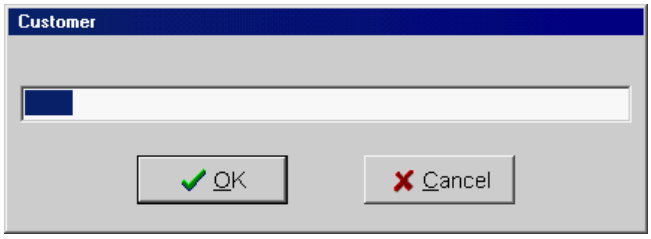
Note : When a report is produced for the first time in a module, a window automatically opens and allows to choose the predefined report for boxes. Furthermore, when files are included on the report (according to the report options), a second window appears and asks to choose the predefined report for files. These reports are created in the *Customer Information* and *System Information* modules.

From the *File* module

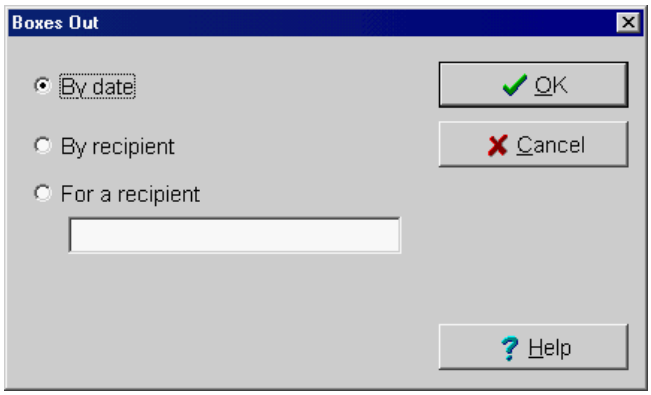
1. Click on **Inventory**->**File** from the *Main window*.
2. Click on **File**->**View Report**|**Print Report**, select one of the available sub-menus and proceed as for boxes. The related report will be printed or displayed soon after.

6.4.2.27 Viewing or printing the list of boxes or files that are out

1. Click on **Inventory**->**Box**|**File** from the *Main window*.
2. Click on **File**->**View Report**|**Print Report**->**Files Out** (*File* module) or on **File**->**View Report**|**Print Report**->**Customer Only**->**Boxes Out**.



3. Enter the code of the desired customer and press **OK**. A new window is displayed.



Note : For box reports, another window appears previously and allows to choose a predefined report.

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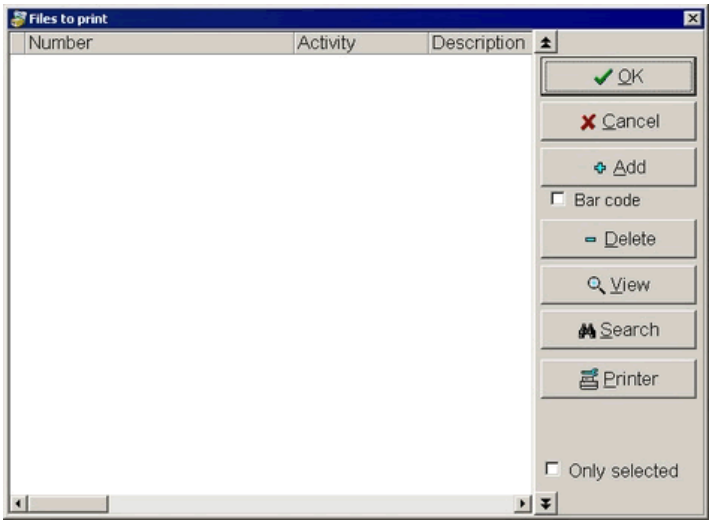
4 Select how the results will be displayed on the report by checking off the appropriate option and press **OK**. The report will be printed or displayed soon after. When viewing reports, click on the **Close** button of the report's window to finish.

6.4.2.28 Printing Box and File Details

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired item.
3 Click on **File**->**Print Box|File Details.** A window appears.
4 Enter the customer code or press **OK** to have the list of customers (select a customer and it will appear highlighted). Press **OK**. A window appears.



5 To add a box|file press the **Add** button.

Files: a message will appear asking to select files by description: press *Yes* to select files by description; press *No* to select by number; press *Cancel* to abort the addition of files. If you said *Yes*, enter a description and press **OK**. If you said *No* enter a file number and press **OK** . In either case a list of files will appear, select the desired files (they will appear highlighted) and press **OK**.

Boxes: a window will appear asking for the box number; enter a box number and press **OK**. A list of boxes will appear, select the desired boxes (they will appear highlighted) and press **OK**.

6 To delete a box|file from the list: select the box|file from the list (it will appear highlighted) and press the **Delete** button.
7 When all boxes|files have been added to the list press **OK**.
8 The details will automatically be printed for the selected boxes|files.

6.4.2.29 Viewing and adding keywords

Keywords are used to facilitate the *Full Text Search*. To activate the Full Text Search (and the keywords option) for a customer, see the Setting up a customer to use Full Text Search at RC 86 topic.

Viewing keywords

1 Click on **Inventory**->**Box**|**File** from the *Main window*.
2 Search the desired item, click on **View**->**Keywords**. A window appears with the keywords of the box|file.

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Adding keywords

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **Edit**-> **Extra Keywords**. A window appears.
3 Enter the new keywords.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

6.4.2.30 Viewing or editing the alternate label of a box

Viewing alternate labels

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **View**->**Alternate Label**. A window appears with the alternate label of the box|file.

Editing alternate labels

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **Edit**-> **Alternate Label**. A window appears.
3 Enter the changes.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

See also the topic Using alternate labels while adding and editing items 315 for more information.

6.4.2.31 Viewing the last orders of a box or file

Viewing the last orders of a box|file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **View**->**Last Order**. A window appears with the last order(s) of the box|file.

6.4.2.32 Imaging module

6.4.2.32.1 Overview (Imaging)

The Imaging module is accessible from the File module instead of the Main window. This is because images are associated with the files from which they were created.

Available reports
- (None. See the *Report* 364 module)

Fields
- (Image)

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Tasks
- Opening the Imaging module 340

Distinctive menu options:

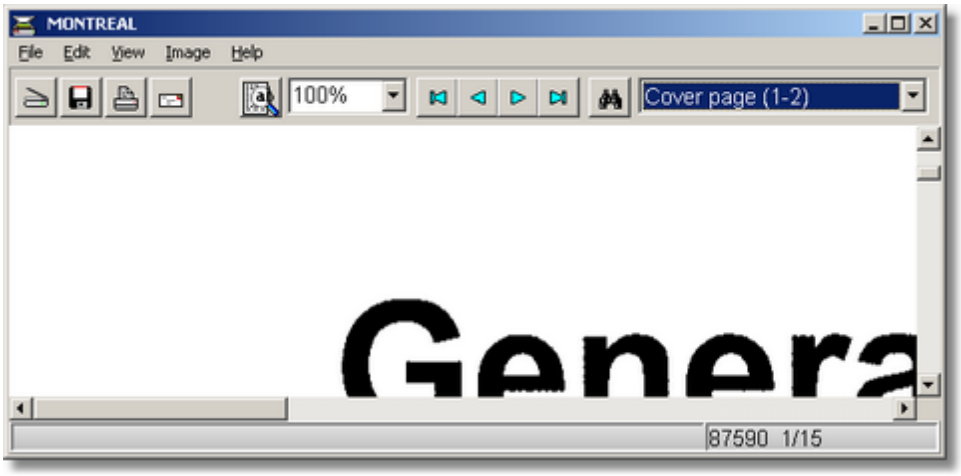
File menu
- Scan 340
- Select Scanner 340
- Save (Saving scanned images) 342
- Print (Printing scanned images) 341
- OCT (Performing Optical Character Recognition) 344
- OCR and index 345
- OCR Indexing Options 346
- Email (Sending images by Email) 346
- Import (Importing images) 347
- Export (Exporting images) 347

Edit menu
- Undo
- Copy Image 347
- Paste New Image 347
- Find
- Documents 343
- Delete Image(s) 342
- Delete separator page 343
- Keywords 344

View menu
- Viewing an image 348 (various options)
- Keywords 344
- Viewing the information of an image 348

Image menu
- Editing a scanned image 341 (various options)

Module window:



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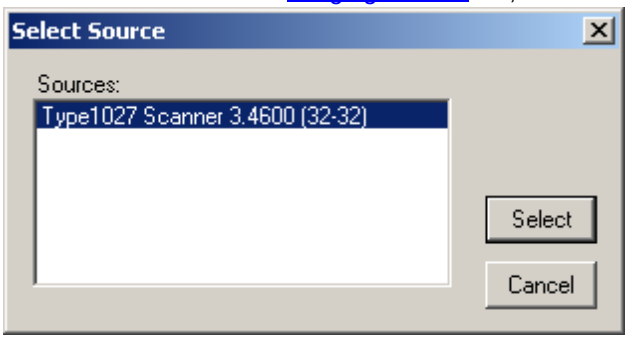
6.4.2.32.2 Opening the Imaging module

1. In the **Inventory->File** module, navigate to the desired file.
2. Press **Ctrl-I**, click on the images icon , or select **File->Images** from the menu.
3. The Imaging module's window is displayed on the screen.

Note : The Images icon is only present when documents have already being scanned in the file.

6.4.2.32.3 Selecting a scanner

1. From the menu of the Imaging module 340, select **File->Select scanner**.



2. Choose one of the scanner engine attached to the workstation and click **Select**.

Note: EDC RC requires a TWAIN-compliant driver in order to operate your scanner. These drivers are usually available for download from the website of the manufacturer of the scanner.

6.4.2.32.4 Scanning documents

When documents are imaged for a customer in EDC RC, they can be viewed by the customer online through ActiveWeb (with the appropriate web license) or EDC ActiveFile.

Important Note: The present method does not capture charges. Scanning to fulfill imaging on demand 141 orders is done in the imaging on demand 539 module. Larger imaging jobs are frequently scanned and then imported 347.

To scan images directly to EDC without capturing charges:

1. From the *Imaging* module opened to the correct file, click **File->Scan**, or click the **scan** button. A window specific to your scanner appears.
2. Perform the scanning.
3. Process 341 the image if desired, with various options on the **Image** menu
4. Save 342 the image. (**File->Save**)

The images are saved in the default image directory of the system (settings of the System Information module). These images are available immediately on the web and will be available in EDC ActiveFile upon replication.

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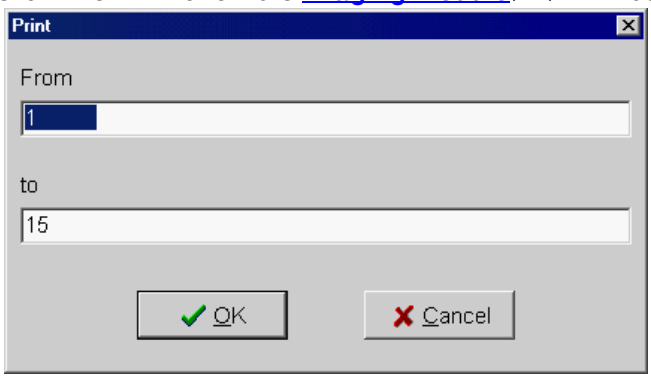
6.4.2.32.5 Printing scanned images

1. Click **File->Print** from the **Imaging module** 340. A window appears.



2. Enter an interval of pages to be printed and press **OK**.
3. The images will automatically be printed from the default printer.

Note : Printing parameters can be modified by clicking on **File->Print Setup** from the Imaging module.

6.4.2.32.6 Editing a scanned image

When documents have just been scanned but are not saved, the scanned images can be modified. For example, when a document is scanned recto-verso, the header of the verso image is upside down. Then it is necessary to rotate this image with a 180° angle. As soon as it is saved, the content of a scanned image cannot be modified anymore. It will be displayed, printed and exported as it was modified and not as the original scanned content.

1 On from the menu, **Select image**, then one of the following sub-options:

- **Rotate->90°|180°|270°|Arbitrary.**
- **Mirror->Horizontal|Vertical.**
- **Negative.**
- **Scale to gray.**
- **Sharpen.**
- **Smooth.**
- **Contrast->Increase|Decrease.**
- **Brightness->Increase|Decrease.**
- **Gamma Correction**. A window appears. Enter a numeric value to specify the degree of correction and press **OK**.
- **Format Conversion**. Check off the desired boxes in the following window and press **OK** when finished.

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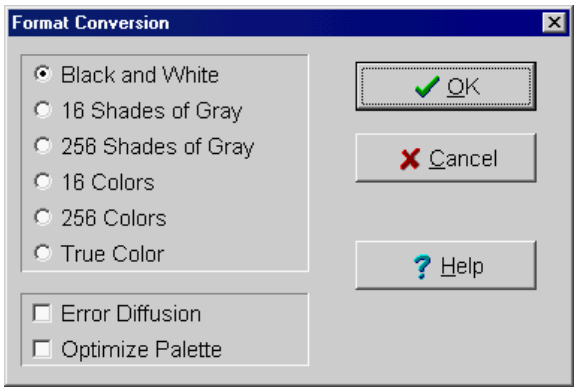


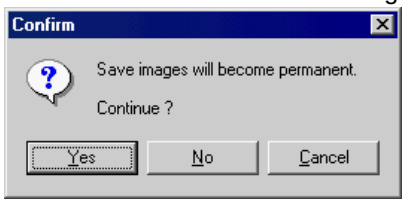
- **Deskew**
- **Despeckle**
- **Border clean up**

3 A window is displayed after choosing and specifying a type of modification. Enter the interval of pages for which the changes will be applied and click on the **Accept** button.

6.4.2.32.7 Saving scanned images

Images become permanent when they are saved. Therefore, all changes must be done before (see "Modifying images 341").

1. Click on **File->Save** from the Imaging module. A dialog box appears.



2. Click on the **Yes** button to confirm the operation.

(The system will automatically prompt you to save or cancel images if you attempt to exit the module without saving.)

Note: When images are saved, the number of images scanned or imported is recorded in the history of the file for reporting purposes.

6.4.2.32.8 Deleting images (before saving)

When documents have just been scanned but are not saved, the images can be deleted. Once the images are saved this is no longer possible.

1. Click on **Edit -> Delete image(s)**. A window appears.

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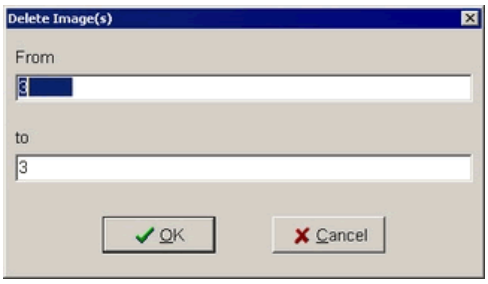


2. Enter a deletion range and press **OK**.
3. Click **Yes** to confirm
4. The image(s) will be deleted.

Note: Images that have been saved can only be deleted for the whole file[499], through the box and file maintenance module.

6.4.2.32.9 Deleting a separator page (before saving)

Document separator pages[214] allow you to automatically name ranges of pages as you scan and import pages. However, if a page is not identified as a separator page by EDC, it remains as an image. To remove this page prior to saving:

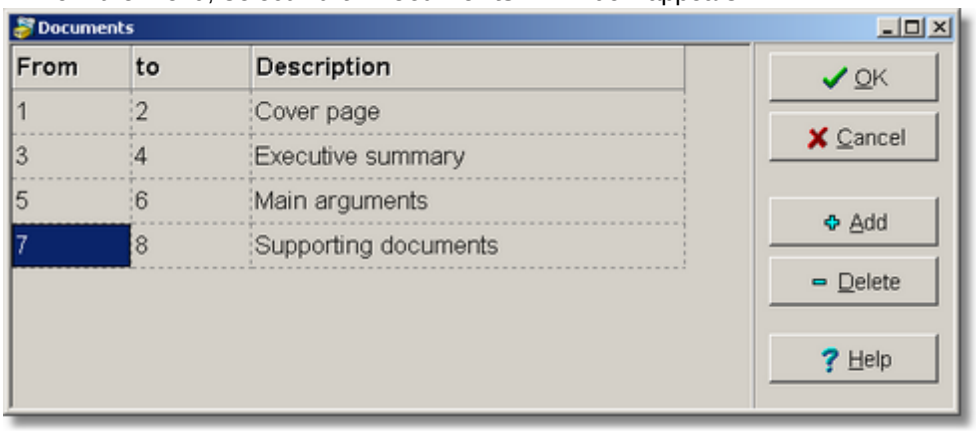
1. From the menu of the imaging module, select **Edit->Delete separator page**.
2. A dialogue window prompts "Delete separator page", defaulting to the number of the page presently displayed. Enter the number of the page to be deleted, then click **Okay** or press **Enter** .

The page will be removed and the numbering on the index will be adjusted.

6.4.2.32.10 Editing a document index

Creating a document index for scanned images makes the pages in a file easier to find, when you have multiple pages of images.

1. From the menu, select **Edit->Documents**. A window appears.



2. To add to the index, click the **Add** button. A new line is added
3. Click on the table to edit the *to* page and the *Description*.
4. When done, click the **OK** button to accept
5. Once the index is created, you can view the index in the drop down field of the *Imaging* module like so:

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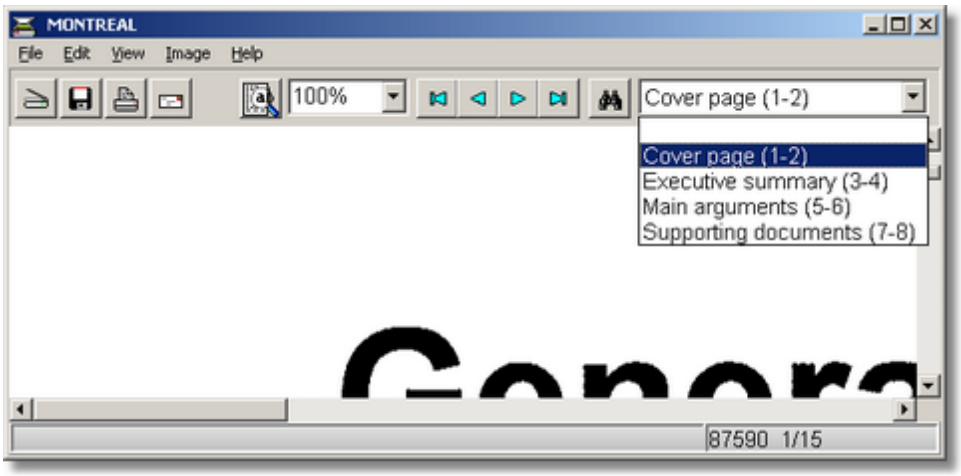
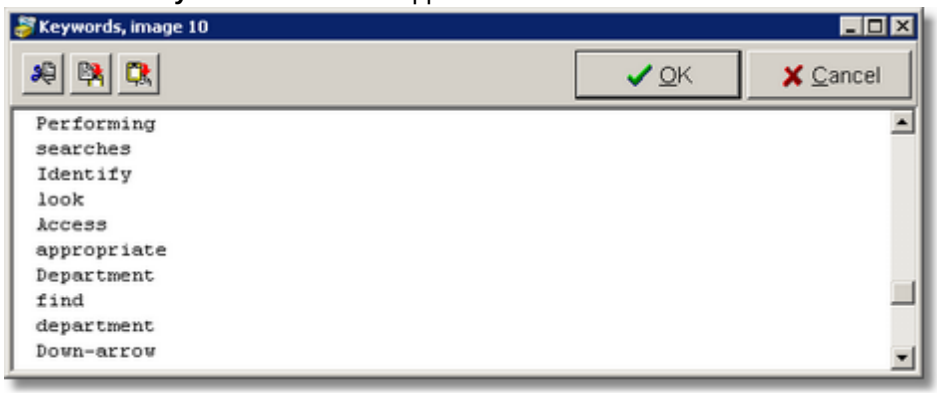


6.4.2.32.11 Editing or viewing keywords for an image

Performing *OCR and index*[345] on an image causes the recognized text to be added as keywords. These are then available through the full text search. However, you may wish to view and modify this list. To do so:

1. Open the imaging module to the correct image[340]
2. Click **Edit->Keywords**. A window appears.



3. Make any changes directly in the window or using copy and paste, then click **Ok** to accept.

6.4.2.32.12 Performing Optical Character Recognition (OCR)

Optical Character Recognition (OCR) converts recognized elements of an image into editable text. The accuracy depends on the resolution and the clarity of the text in the image. Typically, black and white images scanned at resolutions of 240 DPI (dots per inch) or higher produce better results.

(In EDC the image resolution can be viewed in the image information[348].)

1. Open the imaging module (**Inventory->File** module, **File->Images**)
2. Click on **File->OCR** from the Imaging module. A window appears.

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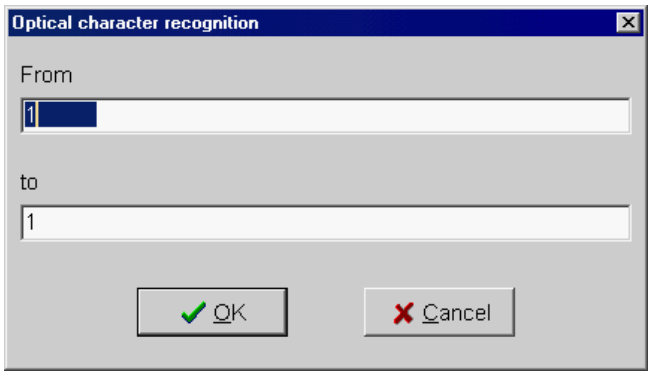
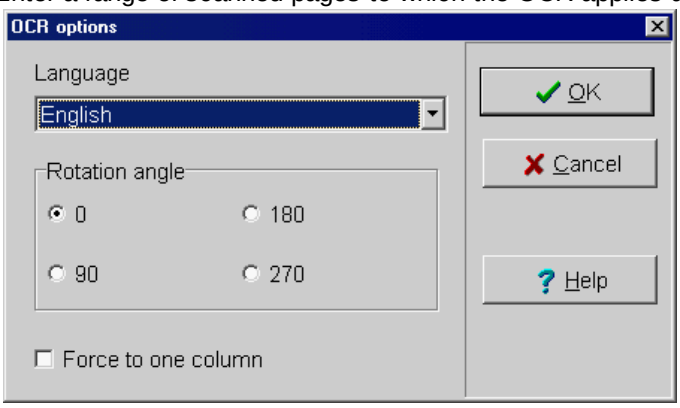
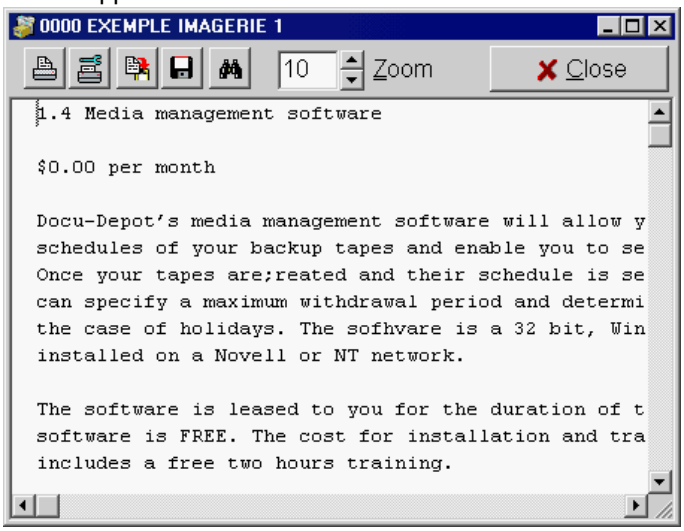


3. Enter a range of scanned pages to which the OCR applies and press **OK**. A window is displayed.



4. Select a language for the recognition and a rotation angle for the images, if necessary (when images are not scanned in a position that allows a direct reading on the screen they must be reoriented). Press **OK**.

The result appears as a text file in a new window.


0000 EXEMPLE IMAGERIE 1
10
Zoom
Close
1.4 Media management software
$0.00 per month
Docu-Depot's media management software will allow y
schedules of your backup tapes and enable you to se
Once your tapes are;reated and their schedule is se
can specify a maximum withdrawal period and determi
the case of holidays. The sofhvare is a 32 bit, Win
installed on a Novell or NT network.
The software is leased to you for the duration of t
software is FREE. The cost for installation and tra
includes a free two hours training.

5. Search, save, print, or copy and paste the text as desired.
6. Click on the **Close** of the report's window to go back to the Imaging module.

6.4.2.32.13 OCR and index

This function performs OCR on the specified image pages, and adds the text directly to the list of keywords for the image.

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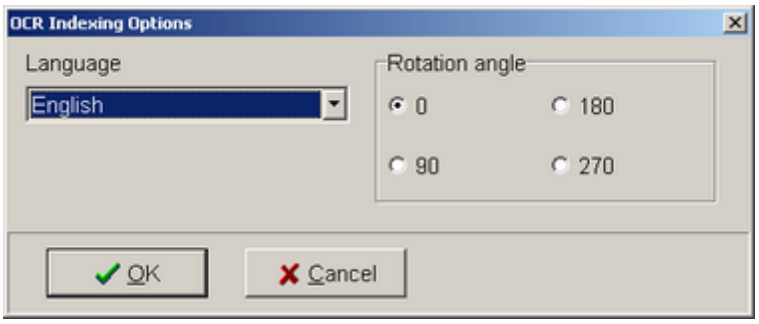
1. Open the *Imaging* module to the desired file. (In the **Inventory->File** module, navigate to the file, then press **Ctrl-I**).
2. Select **File->OCR and Index**.

Recognized text is added automatically to the list of keywords. You may wish to view and edit the resulting list of keywords.

6.4.2.32.14 OCR Indexing Options

1. Open the **Inventory->File** module and navigate to the correct file.
2. From the menu select **File->Imaging**, to open the imaging module.
3. From the menu of the imaging module select **File->OCR Indexing Options**. A window appears:

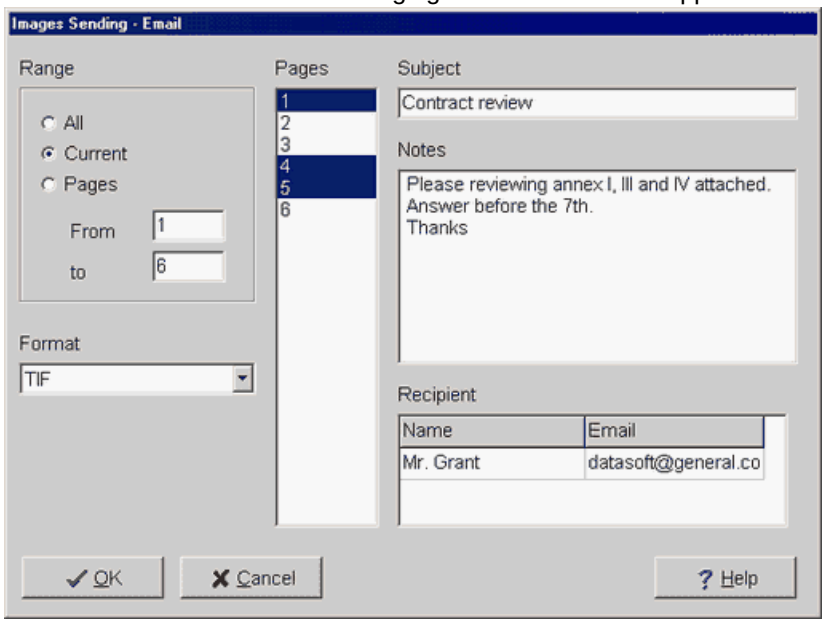


4. Modify the **language** to use or the angle through which to rotate the image prior to OCR.
5. Click **OK** when done.

6.4.2.32.15 Sending scanned images by Email

To send some or all pages of the current image by e-mail:

1. Click on **File->Email** from the Imaging module. A window appears.



2. Select the pages to be sent, and the image format to use.

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3. Choose a file format (TIF or PDF)
4. Enter one or more e-mail addresses, and an option subject and notes, then press **OK** to send images

6.4.2.32.16 Importing images

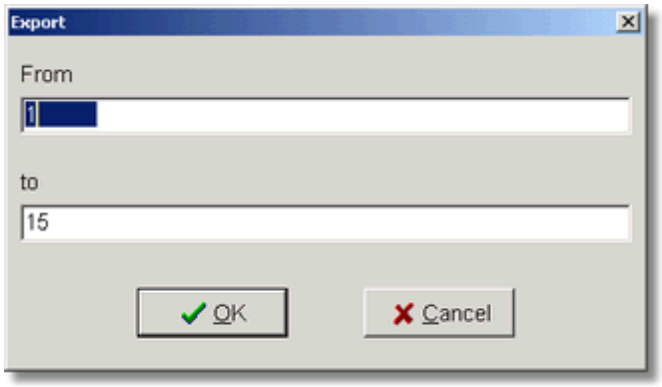
Images may be imported from the following formats : afi, bmp, dcx, pcc, pcx, pdf, jpeg, jpg, pbm, pgm, png, ppm, tga, tif, tiff, and vst.

1. Click on **File->Import** from the Imaging module. A browsing window appears, different for each computer.
2. Locate and select the image file and click the **Open** button..
3. The images will be added to the current EDC file record, and will be displayed on the screen. They can then be edited and saved.

Note: If the imported image is of the PDF format, you will be prompted to select a color format before saving. Options include *black and white*, *grey scale*, or *color*. You may be prompted to run EdcView.exe if it has not previously been run on your computer.

6.4.2.32.17 Exporting images

To export images from a single file:
1. Click on **File->Export** from the Imaging module. A window appears.



2. Enter an interval of images to export and press **OK**. A window is displayed, different for each computer.
3. Select the directory to which the images will be exported, enter a name for the file and click on the **Save** button. The exportation will be automatically performed and the system will come back to the Imaging module's window.

Images for multiple files may be exported simultaneously 250 through the *Customer->Customer Information* module.

6.4.2.32.18 Copying or pasting images

Copy a scanned image from the current file to clipboard
1. Keep on the screen the desired scanned image and click on **Edit->Copy Image**.
2. This image can now be pasted into another application by pressing **Ctrl-V**.

Paste a new image from the clipboard into the current file
1. Capture or copy any image from any other location than EDC with an appropriate software.
2. Open the *File* module, search for the desired file and open the *Imaging module*.
3. Click on **Edit->Paste New Image**. A window appears.

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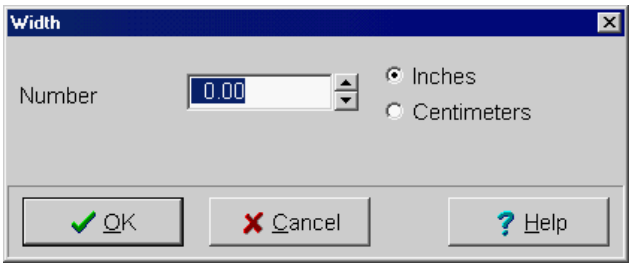


4. Enter a width for the new image (either inches or centimeters) and press **OK**. The new image is automatically added to the current file. Do not forget to save this image when exiting the Imaging module.

6.4.2.32.19 Viewing an image

When viewing an image it is possible to adjust the size on the screen. It is also possible to smooth black and white bitmap images.

Smoothing out a black and white image

1. From the menu of the *imaging* module, click on **View -> Anti aliasing**.

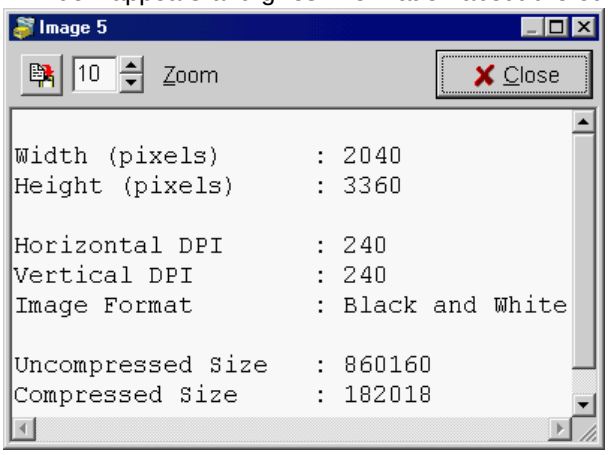
Note: This applies to black and white bmp format images.

Changing the size of the image

1. Click on **View -> Actual Size | Fit width | Fit height | Full page**, or enter a zoom in the drop-down box on the toolbar.

6.4.2.32.20 Viewing the information of an image

1. Click on **View->Image Information** from the *Imaging* module.
2. A window appears and gives information about the current image.



3. Click on the **Close** button to terminate the action.

6.4.2.33 Password protecting an image for the web

Passwords for accessing images in ActiveFile and on ActiveWeb can be assigned at the file level.

1. In the **Inventory->File** module, navigate to the appropriate file.
2. From the menu, select **Edit->Set master image password**. (or press **Ctrl-M**)

Note: To grant an employee access to this option, they will require rights 173 to the *Content*

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Access Management module, either through their user groups or as an additional module.

6.4.3 Search

6.4.3.1 Overview (Search)

This Search module enables you to find boxes and files based on combinations of criteria. Search results can be edited and used to produce custom reports. The edit search 351 allows you to open the box or file modules directly to a record, providing a convenient method for editing the records for a list of specific boxes.

The functionality of this module is also used by the *Orders->Order* module in selecting boxes using box or file searches.

Available reports

- list of Boxes | Files found with search criteria, ordered by number, description, entry date, disposal date, start date, end date, old box number (box only), owner, original location (box only), field 1, field 2, or field 3

Fields (none)

Tasks

- Searching for boxes or files 350
- Modifying the search result list 350
- Opening box or file records from search result lists 350
- Viewing or printing search results 353
- Editing the report options for search results 353

Distinctive menu options:

Search menu

- Box | File search 350
- Edit Box | File search 351

Module window:

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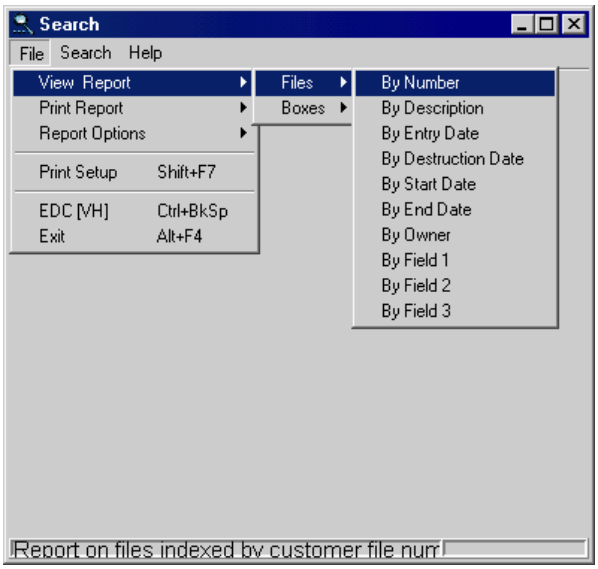
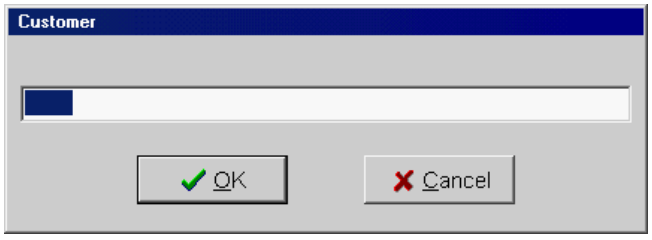
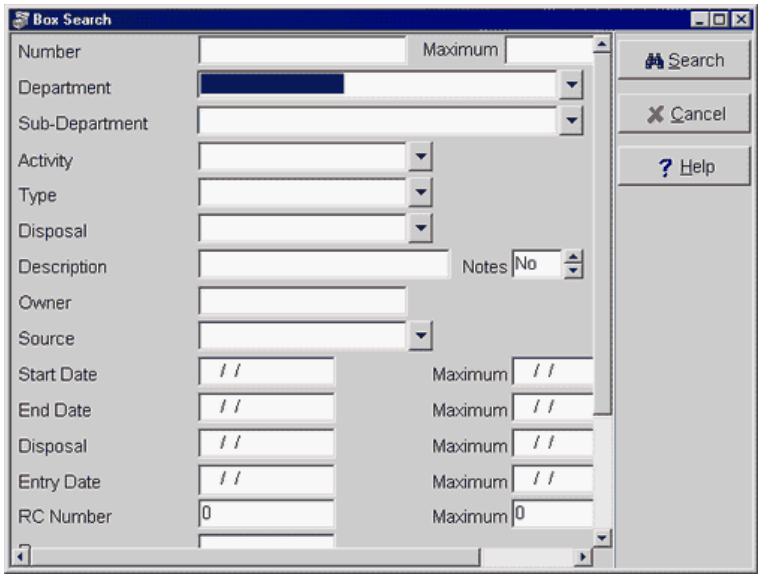


6.4.3.2 Searching for boxes or files

1 Click on **Inventory**->**Search** from the *Main window*.
2 Click on **Search**->**Box Search**|**File Search**. A window is displayed.



3 Enter the code of the desired customer and press **OK**. A new window appears.



Note : When entering a search criterion, the information must be the exact match of what it is

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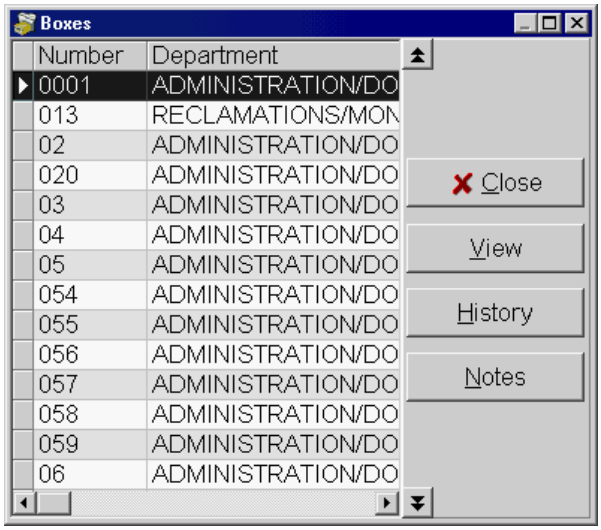
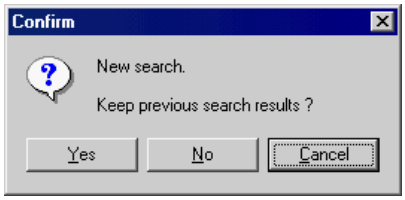
looked for (except for the *Description* and *Notes* fields). A search operation will find all boxes or files containing the specified search criteria. When entering several filters simultaneously, the search result will include only the records containing all the filters.
In the case of *Notes* (if its value is set to "yes") and *Description* fields, any character string to look for can be entered. The system will explore all the contents of those fields and return those containing the specified character string. For example, searching for "Mont" in the *Description* field, will give a search result that include all boxes or files containing "Montreal", Montana", "Month" in that field.

4 Enter the elements searched for in the appropriate fields (they are the fields of the *Box* and *File* modules) and click on the **Search** button. The report's window appears.



5 Select an item and click on the **View**, **History** or **Notes** button, respectively to view the details of the time, its history and notes.
6 Click on the **Close** button to go back into the module and be able to perform another search. A dialog box appears.



7 Perform one of the following actions :

- Click on the **Yes** button to start a new search keeping the previous search criteria.
- Click on the **No** button to start a new search canceling previous search criteria.
- Click on the **Cancel** button to go back to the module's window and to access the detailed search report.

6.4.3.3 Adding or removing boxes or files from search results

Box and file searches produce lists of results that you can use to generate custom reports 353 or work on a series of related items.

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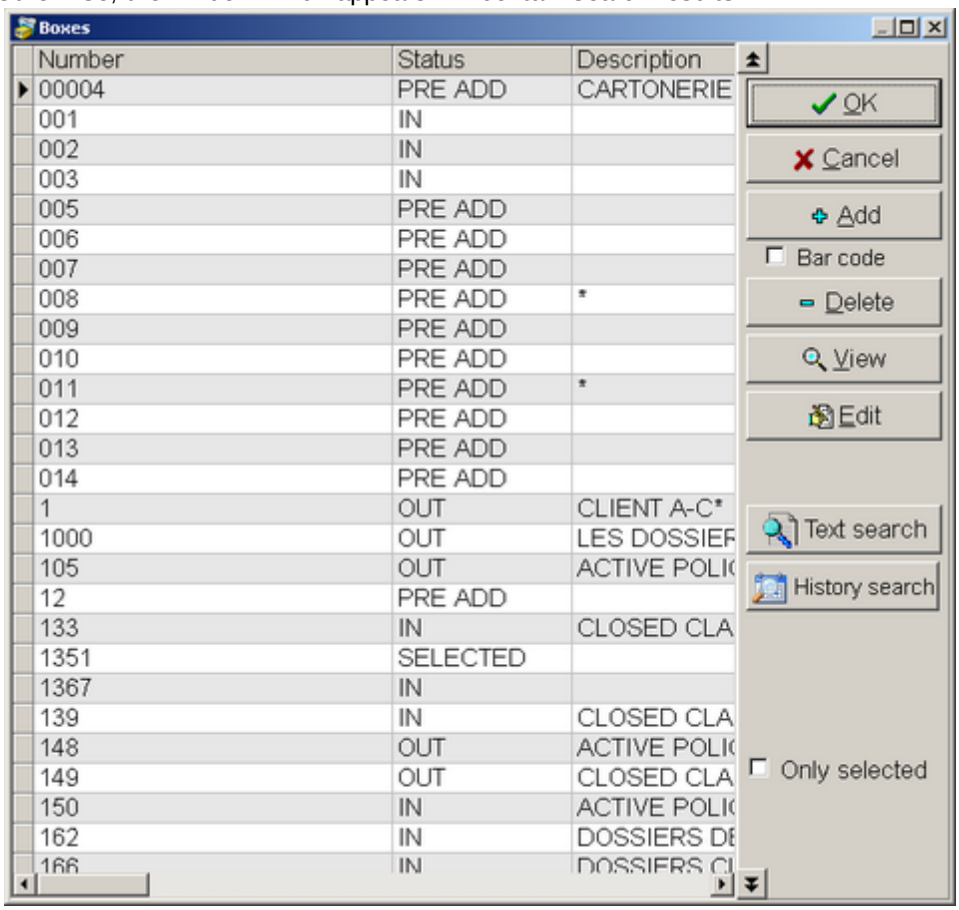
1. In the **Inventory->Search** module, perform a box or file search (see the previous section 350).
2. From the menu, select **Search->Edit Box|File Search**.
3. If no search has been performed, you will be prompted to enter a customer or select a customer key.
4. Otherwise, the window which appears will contain search results.



To add items:

- Click on the **Add** button. (If the Bar code box is checked, you will be prompted to scan the item's bar code. Otherwise, enter a number or description, highlight the desired items, and click **Accept** .)

To remove items from the list:

- Select the desired items and click on the **Delete** button.

To view a summary report of an item:

- Select the desired items and click on the **View** button.

To open the box or file module to an item on the list:

- Select the desired items and click on the **Edit** button.

To add items with a Full Text search:

- Click on the **Text Search** button.
- Perform the search 363
- Select an item and click **OK**. It will be added to the list.

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To add items with a History search:
- Click on the **History search** button.
- Select the date range and activities 396 to include.
- Click **OK**. Items meeting the specified criteria will be added to the list.

To limit the list to selected items:
- Highlight items on the list to keep.
- Check the *Only Selected* box.
- Click the **OK** button. You will be returned to the module window.
- If you wish to continue modifying the list, select **Search->Edit Box|File Search** from the menu again.

5. When done, click the **OK** button to accept modifications to the list.

6.4.3.4 Viewing or printing search results

1. In the **Inventory->Search** module, select **Search->Box | File Search** to perform a search 318.
2. Click the **Cancel** button when done, to avoid performing a subsequent search.
3. Optionally, modify the search results 351 using **Search->Edit Box | File Search**.
4. From the menu, select **File->View Report|Print Report->Files|Boxes** and select the sort order.

6.4.3.5 Editing the report options for search results

When producing search results, it is possible to choose the desired pre-defined report and to modify the information that will be displayed. These modifications are not saved in the system and are lost as soon as the *Search* module is closed.

Before viewing or printing search results (when the default report is not used) it is first necessary to choose a pre-defined report. A different report can be selected and modified for each search.

1 Click on **Inventory**->**Search** from the *Main window*.
2 Click on **File**->**Report Options**->**Box**|**File**->**Select Predefined Box Report**|**Select Predefined File Report** . A list appears and displays all the reports pre-defined in the system.
3 Select the desired report (it will appear highlighted) and press **OK**. The system goes back to the module's window.
4 Click on **File**->**Report Options**->**Box**|**File**->**Modify Box Report Fields**|**Modify File Report Fields**. A window is displayed.

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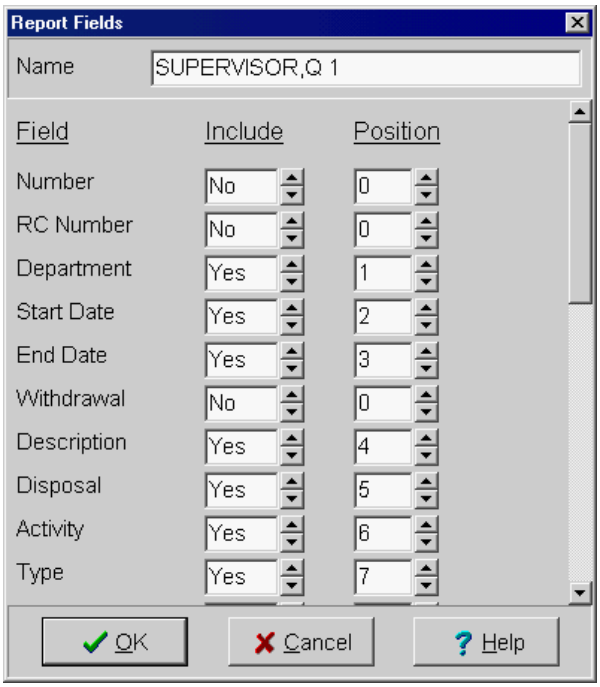

5 Click on the choice buttons of the *Include* column and set the desired fields to "Yes" or "No" if these fields must appear or not on the report. For all the fields that are set to "Yes", click on the choice button in the *Position* column and set their display order. Press **OK** to terminate the operation.

Every search result that is viewed or printed after the current operation will only display the information chosen in **4**.

6.4.3.6 Customer search

The customer search window allows you to create a list of customers based on criteria. It is used in functions such as creating mailing lists 241, applying rate increases for multiple customers 645 and activating many customers to use the Full Text Search 246.

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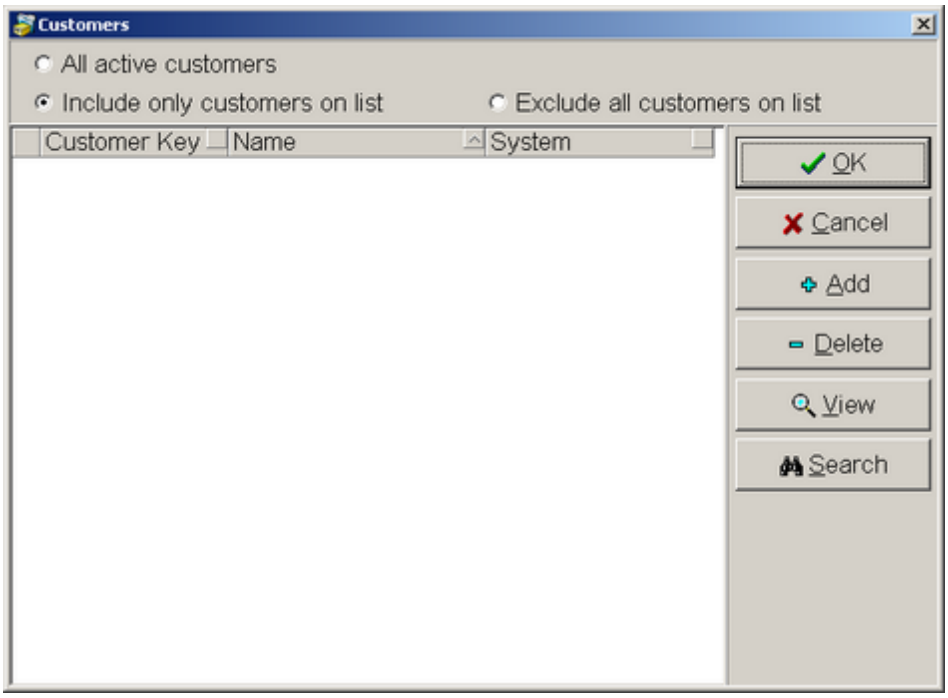
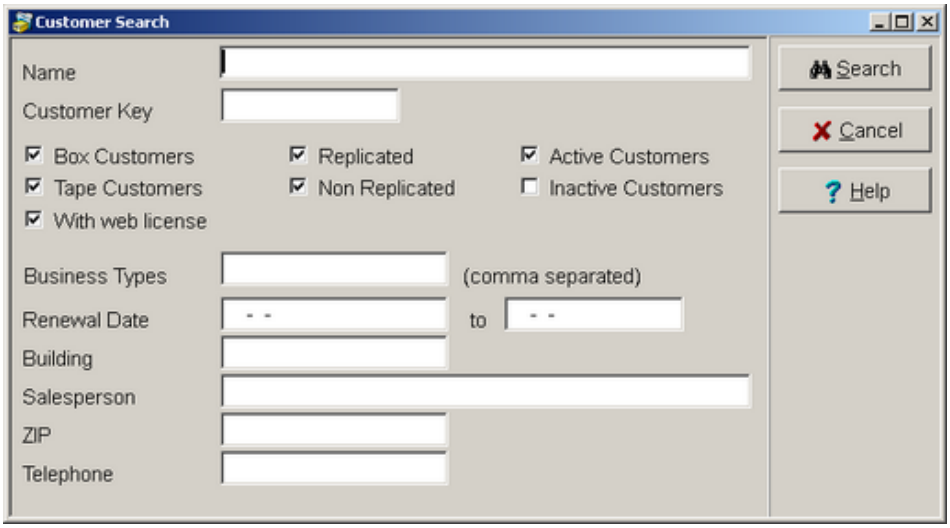


- From the Customers list window, click the **Search** button.



- Enter criteria in the fields, then click on the **Search** button to add all customers meeting all specified criteria to the list.

Fields:

Name[225], **Customer Key**[225], **ZIP**[226], **Telephone**[226]
Alphanumeric fields that limits results to customers whose account data in the customer information match the search string entered, starting from the left. This is not case sensitive. For example, the search string "Cli" in the Name field would return a customer by the name of "Client Demo A", but would not return a customer "Demo Client A".

Box customers | Tape customers
Limits the results based on the container type[232], which may be either tape only (tape), or box and tape (box).

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With web licenses
Limits the results to customers that have at least one user license to access ActiveWeb.

Replicated | Non Replicated
Limits the results based on the replication 232 status. This setting becomes "Yes" for customers that use EDC ActiveFile to manage their in-house records, and have their database synchronize automatically with the data at the record center.

Active customers | Inactive customers
Limits the results based on whether or not the account is active 226.

Business Types
Limits the results based on the busines type 228. You may enter multiple values, separated by commas.

Renewal Date
Limits the results based on the date range of renewal dates 229 specified.

Building
Limits the results based on the building 185. You may enter multiple values, separated by commas.

Salesperson
Limits the results based the salesperson 228. You may enter multiple values, separated by commas.

6.4.3.7 Box and File searches

The box and file search windows enable you to create lists of boxes or files based on search criteria. They are used in functions such adding boxes or files to an order with a search 514, or adding boxes or files to a report with a search 351.

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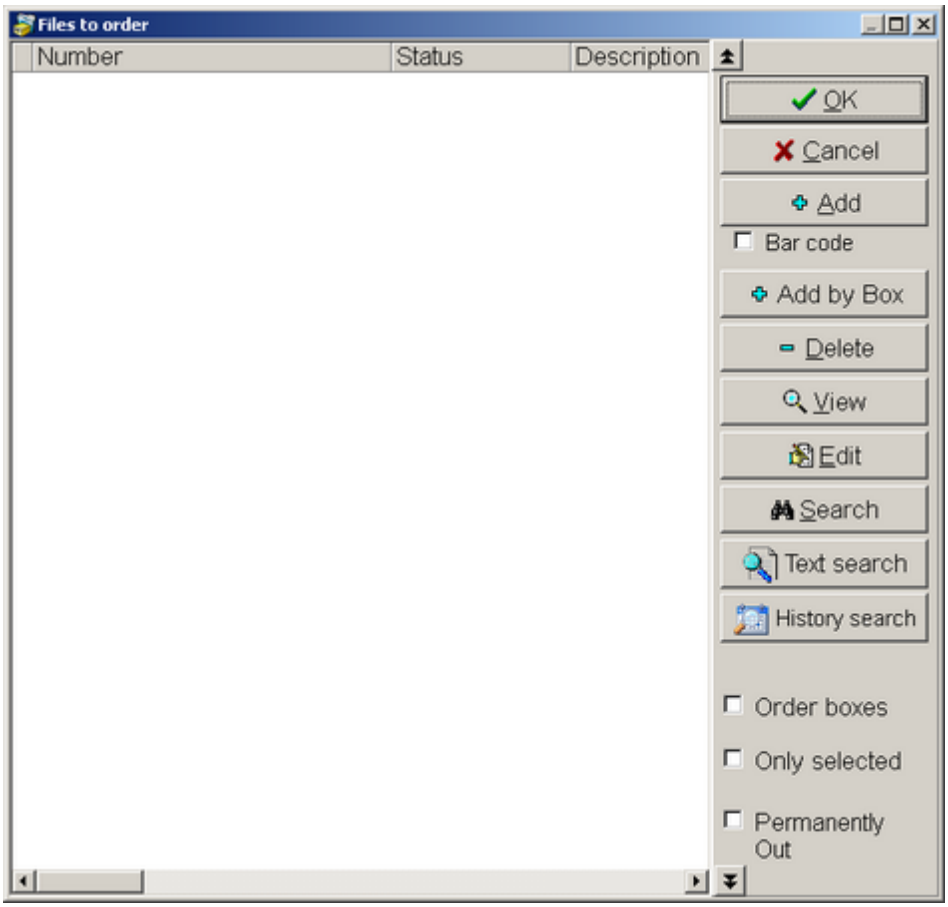

- **Ok** accepts the currently displayed list. If the **'Only selected'** box at the bottom of the window is not checked, all items displayed in the window will be used. If it is checked, only the items highlighted in black will be included in the list. (In the case of placing orders, **"Order boxes"** will cause the boxes containing the files to be ordered instead of the files themselves, and checking the **"Permanently Out"** box causes all items to be marked as "deleted" from inventory.)
- **Cancel** aborts the operation without creating a list.
- **Add** adds items by Number or description. If the **'Bar code'** box is checked, items are added by entering the bar code, typically using a bar code scanner connected to the computer for direct input.
- **Add by Box** allows you to select files or images by starting with the boxes that contain them.
- **Delete** removes the selected items from the list.
- **View** displays the details of the currently selected item.
- **Edit** opens the box or file module to the selected item.
- **Search** builds the list based on searching by parameters as in the search module 350
- **Text search** builds a list based on a full text search 361.
- **History search** builds a list based on item activity 396 history
- **Printer** (where present) opens the printer settings dialogue box.

6.4.4 Rotation schedule

6.4.4.1 Overview (Rotation Schedule)

The tapes that many companies use for backing up their valuable information are typically rotated according to defined schedules.
This module allows the record center to create and view schedules of deliveries for these items.

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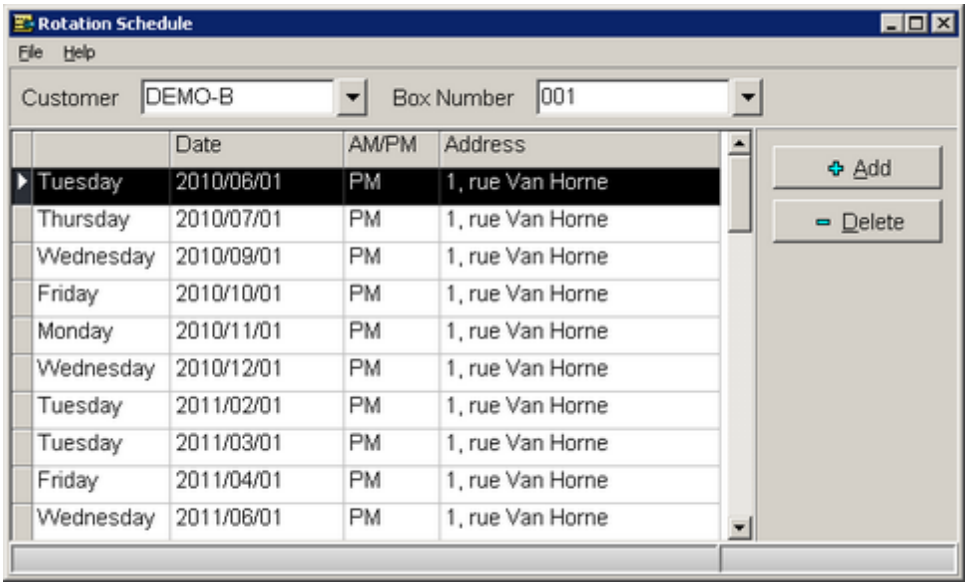
Available reports
- Tapes returned on a holiday 361
- Tape Schedule 361

Tasks
- Adding or deleting a delivery date 360

Distinctive menu options:

File menu
- Delivery date series creation 358
- Change delivery address 360

Module window:


Rotation Schedule
File Help
Customer DEMO-B
Box Number 001
Date AM/PM Address
Tuesday 2010/06/01 PM 1, rue Van Horne
Thursday 2010/07/01 PM 1, rue Van Horne
Wednesday 2010/09/01 PM 1, rue Van Horne
Friday 2010/10/01 PM 1, rue Van Horne
Monday 2010/11/01 PM 1, rue Van Horne
Wednesday 2010/12/01 PM 1, rue Van Horne
Tuesday 2011/02/01 PM 1, rue Van Horne
Tuesday 2011/03/01 PM 1, rue Van Horne
Friday 2011/04/01 PM 1, rue Van Horne
Wednesday 2011/06/01 PM 1, rue Van Horne
Add
Delete

Note:
- A customer must have a web license that includes Rotation in order to make use of this function.
- Many record centers use ActiveWeb instead of this module to enter rotation schedules on behalf of the customer.
- Creation of rotation orders is triggered by the creation of picking lists. It is therefore important to create a picking list 529 every delivery cycle (day or half-day), even if no external orders have been placed.

6.4.4.2 Creating a rotation schedule

To create a rotation schedule in EDC RC:

1. Open the **Inventory->Rotation Schedule** module
2. Select a customer in the drop down field at the left of the window (to have the list of customers

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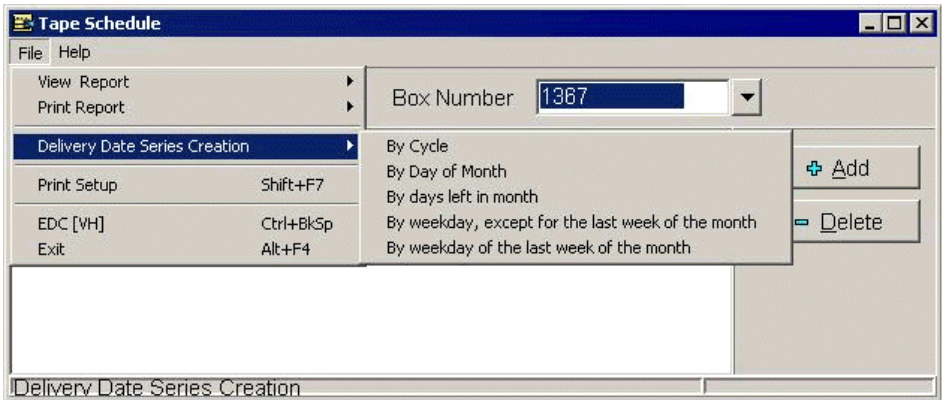
press **OK** in the customer window)
3. Select a box number in the drop down field at the right of the window (to have the list of boxes press **OK**)
4. From the menu, select **File->Delivery Date Series Creation**
5. Select a type (by cycle, by day of month, by days left in a month, by weekday except for the last week of the month or by weekday of the last week of the month)



If you have chosen the delivery by cycle :

1. Choose a start date for the deliveries
2. Choose the number of days you want the cycle to be repeated
3. Choose the end date of the deliveries
4. Select a delivery address in the list (it will appear highlighted) and press **OK**

If you have chosen the delivery by day of the month :

1. Choose a start date for the deliveries
2. Choose the day you want the tapes delivered (ex: for the fifteenth write 15)
3. Choose the end date of the deliveries
4. Select a delivery address and press **OK**

If you have chosen the delivery by days left in the month :

1 Choose a start date for the deliveries
2 Choose the number of days before the end of the month
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

If you have chosen the delivery by weekday, except for the last week of the month :

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

If you have chosen the delivery by weekday of the last week of the month:

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered

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3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

Example: If you want the tape to return every Friday you would:

1 Go in **Tape schedule->Delivery Date Series Creation -> By Cycle**
2 Choose a start date (on a Friday)
3 Choose a number of days (7)
4 Choose any end date
5 Select a delivery address and press **OK**

Note: If there are any invalid dates, a report of errors will appear in the window. When this happens one either changes certain dates or leaves the delivery list unchanged.

To use the Tape schedule, a delivery type 624 with the following parameters must be available:
Ship mode - By date
Courier - Record center
Order - Put it first in the list (see the Ordering 623 field of the Delivery Type module).

6.4.4.3 Adding or deleting a delivery date

To add a delivery date

1 Click on **Inventory - > Rotation Schedule** from the Main window
2 Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3 Press on the drop down button of the box field, enter a box number or press **OK** to have the list of boxes.
4 Click on the **Add** button
5 Choose a delivery date
6 Select a delivery address and press **OK**

To delete a delivery date

1 Click on **Inventory - > Rotation Schedule** from the Main window
2 Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3 Press on the drop down button of the box field, enter a box number or press **OK** to have the list of boxes.
4 Select the date you want to delete (the date should appear highlighted)
5 Click on the **Delete** button

6.4.4.4 Changing a delivery address for tape rotation

To change a delivery address for a tape rotation

1. Open the **Inventory - > Rotation Schedule** module.
2. Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3. Press on the drop down button of the box field, enter a box number or press **OK** to have the list

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of boxes.
4. From the menus, select **File->Change Delivery Address**
5. Click **Yes**, then select the new delivery address. The address for the remaining deliveries of this tape will be updated

6.4.4.5 Viewing or printing tapes returned on a holiday

1. Click on **Inventory - > Rotation Shedule** from the *Main window*
2. Go in **File -> View | Print report -> Tapes returned on a holiday**
3. The list of all tapes (sorted by customer) returned on a holiday will be automatically displayed or printed

6.4.4.6 Viewing or printing the tape schedule of a customer

1. Click on **Inventory -> Tape schedule** from the Main window
2. Go in **File -> View | Print report -> Tape schedule**
3. Enter the customer key (to have the list of customers press **OK** in the customer window and select a customer)
4. Enter a date range
5. The list of all delivery dates for this customer will be automatically displayed or printed

6.4.5 Full Text Search

6.4.5.1 Overview (Full Text Search)

The *Inventory->Full Text Search* module can be used to locate records that contain specific words somewhere in unspecified text fields. From the search results, it is possible to view details of a record or open to it in the *box* or *file* module.

Available reports
- list of boxes found with search criteria
- list of files found with search criteria

(**Note:** For reports it is more convenient to use the Inventory->Search 349 module, which has full-text search capabilities in the Search->Edit box | File Search 351 function.)

Fields 362 **(see the next section)**

Tasks
- Performing a search 363
- Viewing or printing a list of boxes found with search criteria 363
- Viewing or printing a list of files found with search criteria 363

Distinctive menu options:

File menu
- Report options 353
- Change customer 363

Module window:

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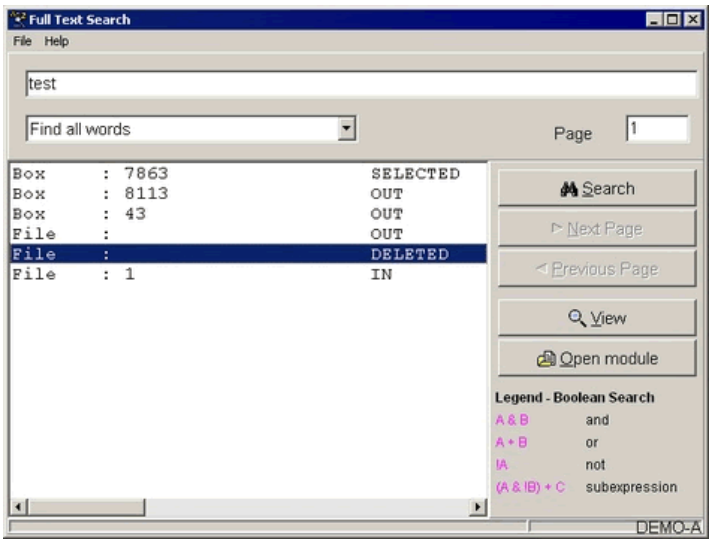

6.4.5.2 Fields (Full Text Search)

Search text
Enter words, characters, or expressions to be found in any text field, including descriptions, notes, and user-defined fields.

- Searches are not case-sensitive.
- Characters 364 such as / and . are treated as spaces. Searching for "she/he" will produce the same results as searching for "she he".

Search type
Drop-down field that can contain "Find all words", "Find any of these words" or "Advanced search" This field allows to select a search mode.

- **Find all words:** Identifies documents that contain all of the search text words, as written, in any indexed text fields.
- **Find any of these words:** Identifies documents containing as least one of the words, as written, in any indexed text fields.
- **Advanced search:** Permits the use of more complex search expressions.

Advanced search behaviour (Boolean expressions)

Boolean operators
- * : Wildcard character that matches 0 or more characters, and may be placed at the beginning or end of a word, (but not both in the same word). Searching "MIKE*" will find all the documents containing MIKE, MIKEY, etc.
- & : *And* character that is satisfied if the condition before and the condition after are both true. Searching for "MIKE & SALE" will find only documents containing both of these words.
- + : *Or* character that is satisfied if either the condition before or the condition after it is satisfied. Searching "MIKE + SALE" will find all the documents containing MIKE and all the documents containing SALE.
- ! : *Not* character. The expression is satisfied if what follows it is not. Searching "MIKE & ! SALE" will find all the documents containing MIKE but excluding SALE.
- ( ) : Sub-expressions inside brackets are evaluated first. Searching "(MIKE + ALICE) & SALE& !PURCHASE" will produce results that include MIKE or ALICE, that do include SALE, but do not include PURCHASE.

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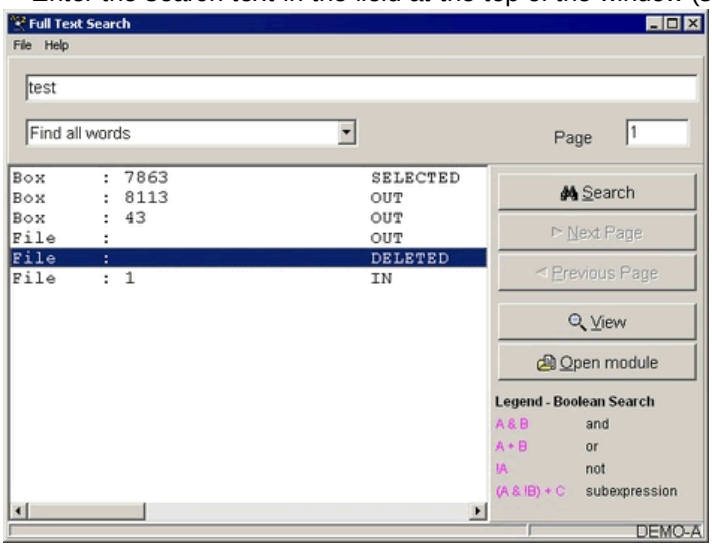
Page
Indicates the number of the current page from search results.

Results
Zone where search results are displayed.

Note: See "Setting up a client to use the Full Text Search at RC 86 " .

6.4.5.3 Performing a search

1. Open the **Inventory -> Full Text Search** module.
2. Select a customer (to have the list of customers press **OK** in the customer window). (To change customers, select **File->Change customer**.)
3. Select a *type of search* in the drop down field
4. Enter the search text in the field at the top of the window (see the previous topic 362 for details)



5. Press the **Search** button to begin the search.
6. To view details of a result, highlight the result press the **View** button.
7. To open the Box or File module to a result, highlight the result and click the **Open module** button.

6.4.5.4 Viewing or printing Full Text Search results

Note: The Inventory->Search 349 module is more flexible for reporting purposes and has full-text search capabilities through the Search->Edit box | File Search 351 function.)

1. Perform a Full Text Search 363
2. Click on **File->Report Options->Box|File** and choose a predefined report or modify report fields if desired.
3. Click on **File->View Report|Print Report->Files|Boxes**. The chosen report will be printed or displayed soon after. Click on the **Close** button of the report's window to end the viewing.

Note : Only the search results that have been viewed before are displayed in these reports. If the report is produced right after performing the search and without clicking on the **Next Page** button, only items included in the first page of result are displayed on the report.

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6.4.5.5 List of separating characters

Characters in the following list are treated as spaces separating words:

. , : ; ` ' ' " " ¨ ~ · « » ( ) < >
[ ] { } ¦ | ? ¿ ! ¡ + ± ^ ¸ & @ *
® ¶ ¤ ° $ ¢ £ ¥ % ¾ ½ º 1 2 3 a

6.4.6 Report (SQL)

6.4.6.1 Overview (Report SQL)

The *Inventory->Report* module enables record centers to import, view, modify, and create reports on various data in *EDC RC*. A tutorial is available at ftp://docudatasoft.com/EDC/common/Learning_Report_Builder/

Tasks

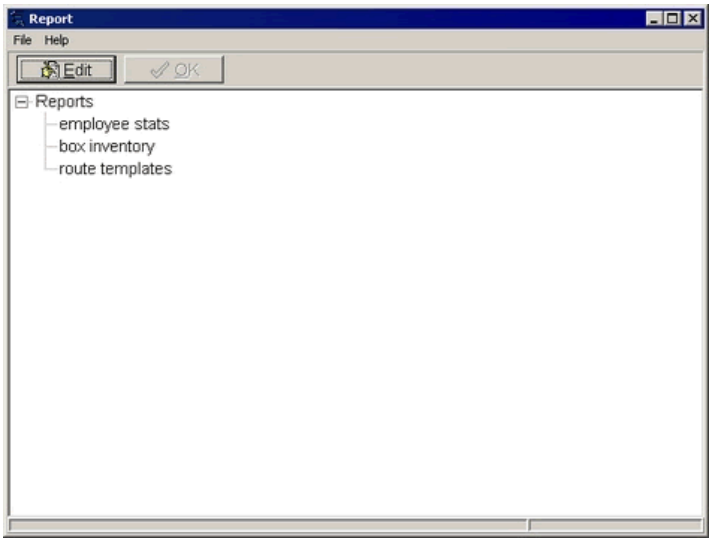
- Working with reports (adding, editing, importing, etc.) 365
- Customizing imported reports 367
- Working with the Design tab 368
- Working with the Data tab 372

Distinctive menu options:

File menu

- Import 365

Module window:



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6.4.6.2 Working with reports

*Adding and Importing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 To add a new report to a folder, select the folder (ex:Reports) and it will appear highlighted.
4 Right-click on it with your mouse and select *Add a child* from the menu.
5 A window appears. Enter the new report's name and press **OK**.
6 Double-click on your new report to open it.
7 Click on **File->Import**. A window appears (the window is different for each computer).
8 Select a report (it will appear highlighted) and press **Open**
9 Perform small changes (at least one)*
10 To save the report, click on **File->Close**
11 A message appears: "Save the changes".Press *Yes* to save the changes.
12 When all is done, press **OK**.

*If no changes are performed, the report cannot be saved.

Editing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Perform the changes needed
5 To save the report, click on **File->Close**
6 A message appears: "Save the changes".Press *Yes* to save the changes.
7 When all is done, press **OK**.

Renaming a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Rename* from the menu.
5 A window appears. Enter a new name for the report and press **OK**.
6 When all is done, press **OK**.

*Editing the access rights of a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Access rights* from the menu.
5 A window appears.

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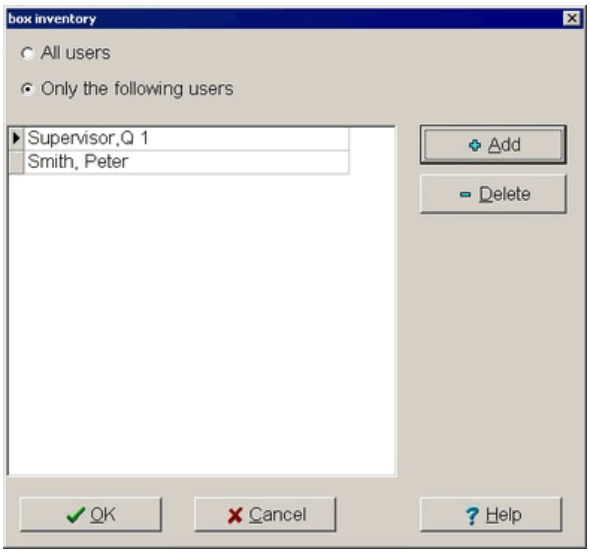

5 To make this report available to all users, select the *All users* option.
6 To make this report available to a few users, select the *Only the following users* option.
7 To add users, click on the **Add** button. A list of users will appear. Select the desired users (they will appear highlighted) and press **OK**. They will automatically appear on the list.
8 To delete users, select the desired users from the list (they will appear highlighted) and press the **Delete** button.
9 When all the changes have been made, press **OK**.
10 When all is done, press **OK**.

Deleting a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Delete* from the menu.
5 A message appears: " Permanently delete (report's name) and all its children ? Related information will be deleted."
6 Press *Yes* to delete the report, *No* or *Cancel* to abort the operation.
7 When all is done, press **OK**.

Previewing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select *Report*.
4 To preview the report, click on the *Preview* tab.
5 Depending on the chosen report, some fields might be making references to the different activity codes (ex: the codes for the box activities or the delivery activities.) To understand all the different activity codes, see the Activity codes 662 chapter of the Appendix.

Printing a report

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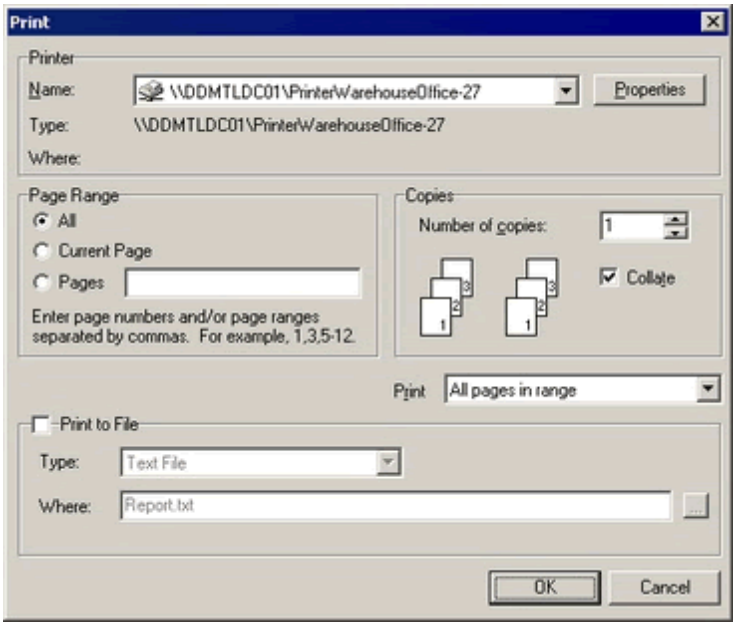
1 Click on **Inventory**->**Report** from the *Main Window*.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select *Report*.
4 Before printing a report it would be better to preview it (to preview the report, click on the *Preview* tab.)
5 If printing from the *Preview* tab, click on the **Print** icon . If printing from the *Design* or the *Data* tab, click on **File -> Print**. A window appears.



6 Select a printer, a page range, a number of copies. If the print to file option is checked off, select a file type in the drop-down list. Click on the **Browse** button to specify a file name and the repertory where it will be saved.
7 Press **OK**

For all subsequent report topics, assume that the *Report* module has already been opened and that a new report has already been created.

6.4.6.3 Customizing an imported report

Specifying a customer

Using the Search Data icon

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon
6 Enter the CustNo 712 or the CustKey 712 in the appropriate field.
7 Press **OK**

In the Data tab

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1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field called CustNo 712 or CustKey 712.
6 Click on the **Search** icon
7 Enter a value in the value column beside the CustNo 712 or the CustKey 712 field.

Note: This option is only available if one has rights to edit a report. When the CustKey 712 is selected, the value entered is case sensitive.

Specifying a date range

Using the Search Data icon

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon
6 Enter the date in the appropriate fields.
7 Press **OK**

In the Data tab

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field that specifies the word Date (ex: DeliveryDate, HxDate, OrderDate, etc.)
6 Click on the **Search** icon
7 Enter the date in the value column beside the selected "date" field.

Note: When specifying a date range, one must be certain that the dates entered corresponds to the date mask specified in the System Information 197 module.

6.4.6.4 Working with the Design tab

All the following operations are available when opening a report in the *Report* module. The design tab is the default tab that will automatically appear when a report is opened.

For beginner users :

These operations are mostly used when one wants to add a few things to a report that was previously imported.

Adding text

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1 Click on Inventory->Report from the Main Window.
2 Click on the Edit button
3 Double-click on the report to open it.
4 Click on the Design tab.
5 Click on the Text icon and click on the location of your choice in the report.
6 To edit the text within the label, select the label and edit the text in the Set value field from the toolbar.

Adding a bar code

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **BarCode** icon and click on the location of your choice in the report.
6 To edit the text within the label, select the label and edit the text in the *Set value* field from the toolbar.

Note: To choose the type of bar code, right-click on the bar code and click on the *Configure* menu item. The type that is usually recommended is Code 128 since it includes a check digit that can be read by the PDT. Make sure that the *Autosize* and the *Autosize Font* options in the right-click menu are disabled.

Adding a system variable

A component that allows you to display the page number, time, date, and other useful information.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **SystemVariable** icon and click on the location of your choice in the report.
6 To edit the variable, select the label and select a type in the *Variable Type* field from the toolbar.

Adding a memo

Prints multiple lines of plain text in a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **Memo** icon and click on the location of your choice in the report (normally it is in the detail section).
6 To edit the text within the label, select the label and edit the text in the *Set value* field from the toolbar.

Adding rich text

A component that allows you to print formatted text.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button

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3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **RichText** icon and click on the location of your choice in the report.

Adding an image

Displays graphics such as bitmaps, GIFs, and JPEGs.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **Image** icon and click on the location of your choice in the report.

Adding a shape

Displays various shapes, such as squares, rectangles, circles, and ellipses. Use the *Shape Type* field to select the shape.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **Shape** icon and click on the location of your choice in the report.

Adding a line

Displays a line. Use the *Line Types* field to set the line orientation.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **Line** icon and click on the location of your choice in the report.

Adding a region

A region logically groups components together. This is normally used for layout purposes.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **Region** icon and click on the location of your choice in the report (normally it is in the detail section).

For advanced users:

These operations are mostly used when creating a new report. This section is for people that have a very good comprehension of the concept of a database. These procedures imply linking fields from the design tab to fields from the data tab.

Changing the query time-out length

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1. Click on I**nventory->Report** from the Main Window.
2. Click on the **Edit** button
3. Double-click on the report to open it.
4. Click on the **Design** tab.
5. From the menu, select **File->Query Time Out**.
6. Enter a value in seconds, and click **OK**.

Adding items from the query

DBCalculation

Performs simple database calculations (Sum, Min, Max, Average, Count).

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

The Database Components toolbar has 4 buttons, DBText, DBMemo, DBCalculation, and DBBarcode.

5 Click on the icon of your choice, then where you wish to locate it on your report. (it is often in the detail section).
6 Select a *Data Pipeline* and a *Data field* from the toolbar.

- **DBtext:** When linked to a field in the *Data* tab, will display a single line of text.
- **DBMemo:** When linked to a field in the *Data* tab, will display the content of a notes or memo field. It can expand to accommodate multiple lines.
- **DBCalculation:** Performs simple database calculations. To specify a calculation: right-click on the selected calculation and click on the *Calculations* menu item. Select a calculation in the *Calc Type* field and select a group in *Reset Group* field.
- **DBBarcode:** Converts the data from a database field to a bar code symbol.

Adding a sub-report

A sub report is used when a relationship of one to many is present - this kind of relationship can also be called master detail relationship, it's when for example an order is associated to many order items or when a box is associated to many notes. Many sub-reports can be included in the same report.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **SubReport** icon and click on the location of your choice in the report (normally it is in the detail section).
6 Select a *Data Pipeline* from the toolbar.

Adding a group

A group is used to gather information that is similar in order to separate it from the other data.

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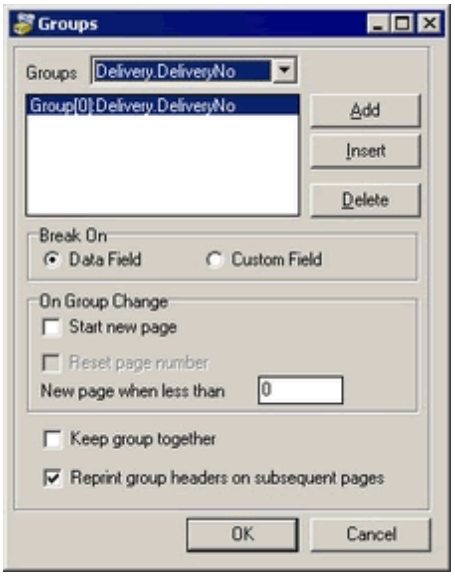
Groups are usually used to facilitate the sorting and the calculation of certain fields. For example one could group a report by department in order to start a new page every time a new department appears in the data. Another example would be to facilitate the calculation of totals for every price code encountered.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on **Report -> Groups**. A window appears.



6 If the *Data Field* field is checked off, one will be able to choose, in the drop -down list, all the fields available in the **Data** tab. If the *Custom Field* field is checked off, one will be able to choose, in the drop -down list, all the fields that have been created specifically for that report (ex: calculated fields, labels or titles, etc.)
7 To add or insert a group to the list, select it in the drop-down list (it will appear highlighted) and press the **Insert** or **Add** button.
8 To delete a group select it in the list of groups (it will appear highlighted) and press the **Delete** button.
9 To start a new page every time the data or custom field changes, check the *Start new page* check box.
10 To keep the group together in one page, check the *Keep group together* check box.
11 Perform all the other selections needed and press **OK**.

6.4.6.5 Working with the Data tab

All the following operations are available when opening a report in the *Report* module. The data tab is the section of the report builder that enables one to select the different fields that will be used to create the report. This section is generally for advanced users that have a very good understanding of the concept of tables as well as a thorough understanding of the way EDC functions.

Selecting a table (see also Tables 708 for more details on the different fields)

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Before selecting a table, it is important to figure out what will be the master/detail relationship; in other words which table will have prominence over the other(s). For example, if one wants to create an inventory report with boxes and files, one would probably specify that the Box table would be the master and the File table the detail.

1. In the Data tab, click on **File -> New**
2. Select the *Query Wizard* icon and press **OK**
3. Select a table (it will appear highlighted) and press on the right arrow to send the table in the Selected tables view.
4. The table names that will appear in bold are usually related tables that can be added at the same time when using joined data views. It is better to use separated table views if one is starting to work with reports since the links between the tables are visible.
5. Click on click on Finish or click on the Next button if you want to specify the fields, the calculations, the groups, the search option

Note: When using joined data views, different join types are available.

Options

Tables (see also Tables 708)
This tab shows all the tables available (at the top) and all the tables that are used in the report (at the bottom). To add a table to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a table from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Table: Table selected

Table Name: Name of the table

SQL_Alias: Name of the table in SQL

Join Type: Different join types available (to edit a join type, press on the **More** button)

- Inner Join : It discards all rows from the result table that don't have corresponding rows in both source tables.

- Full Outer Join : Retains all the unmatched rows from both source tables.

- Left Outer Join : It preserves the unmatched rows from the left table but discards the unmatched rows from the right table.

- Right Outer Join : It preserves the unmatched rows from the right table but discards the unmatched rows from the left table.

Fields (see also Tables 708)
This tab shows all the fields available (at the top) and all the fields that are used in the report (at the bottom). To add a field to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a field from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Calculations

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This tab allows the addition of calculated fields to the report (ex: sum, count, average, maximum, minimum, expression).

Adding a normal calculation: Select a field in the list at the top (it will automatically be added to the bottom list) and select a function in the drop down list of the *Function* column (ex: sum, count, avg, min, max).

Sum: This calculation will do the sum of the selected field.
Count: This calculation will do the count of the selected field.
Avg: This calculation will do the average of the selected field.
Min:This calculation will show the minimum value of the selected field.
Max:This calculation will show the maximum value of the selected field.

Adding an expression: Select a field in the list at the top (it will automatically be added to the bottom list) and select the "expression" function in the drop down list of the *Function* column. Enter the expression in the *Expression* column.

Useful expressions:

Notes fields:

GetBoxNotes(Box.CustNo, Box.BoxDDNo, MaxLength) - displays box notes, up to "MaxLength" characters.
GetFileNotes(File.CustNo, File.FileDDNo, MaxLength) - displays file notes, up to "MaxLength" characters.

Note that "MaxLength" should be replaced with the number of characters that the field is allows to expand to. A typical values is 3000. Larger values may be used if necessary (eg. 65,000)

Barcodes:

GetBoxBarcode(CustNo, BoxDDNo) - Standard box barcode
GetBoxBarcode36(CustNo, BoxDDNo) - Compact barcode, used for tapes
GetFileBarcode(CustNo, FileDDNo) - File barcode
GetLocationBarcode(Location) - Location barcode
GetActiveLocationBarcode(Location, LocationType)
GetEmployeeBarcode(EmployeeNo) - Employee barcode
GetUserBarcode(CustNo, UserNo) - Authorized user barcode, for customer account.

For box history activities:

if(box_history.Activity=1, 'IN', if(box_history.Activity=2, 'OUT', if(box_history.Activity=3, 'SELECTED', if(box_history.Activity=5, 'PRE ADD', if(box_history.Activity=8, 'ON DISPOSAL', if(box_history.Activity=9, 'ON TRANSFER', if(box_history.Activity=10, 'ON DELETION', if(box_history.Activity=11, 'DELETED', if(box_history.Activity=12, 'DESTROYED', if(box_history.Activity=13, 'TRANSFERRED', if(box_history.Activity=14, 'IN (IN-HOUSE)', if(box_history.Activity=15, 'OUT (IN-HOUSE)', if(box_history.Activity=36, 'REVISED', if(box_history.Activity=35, 'SAMPLED', if(box_history.Activity=37, 'SENT TO DEPOT', if(box_history.Activity=27, 'DESTROYED (IN-HOUSE)', if(box_history.Activity=32, 'PRINTED',if(box_history.Activity=39, 'ADDED',if(box_history.Activity=6, 'MOVED', 'end'))))))))))))))))))))

Group (see also Adding a group 371)
This tab is used to add groups to a report.

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Adding a group to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be grouped by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, CustNo) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: Groups allow the report document to be organized into sets of rows that share a common value. However, groups can only function if the field to which they are assigned has been used to sort the data. If you associate a group with a field, but do not sort the data by that field, then the group will still function. That is, the group will generate a group footer and group header each time the field value changes, but because the data is not sorted properly, the group will appear to generate at random. Whenever you see a group generating too many times, check to make sure the data is sorted properly.

Search
This tab is used to add search criteria to a report.

Adding a search criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). Select an operator (=, <>, <, <=, >, >=, like, not like, between, not between, in list, not in list, blank, not blank) and enter a value.

AutoSearch : Check off the *AutoSearch* check box if you want the search criteria to appear in the preview tab of the report.

Mandatory : Check off the *Mandatory* check box if you want the search criteria to be a mandatory step before the generation (or the preview) of the report takes place.

Sort
This tab is used to determine the sorting order of a report.

Adding a sorting criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be sorted by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, CustNo) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: When using groups in your report, make sure that the sorting order and the order of the groups is the same. If it is not, then the report will not sort the data properly.

Desc (z > a) : Check off the *Desc (z > a)* check box if you want the data to be sorted in a manner contrary to the alphabetical order.

SQL
This tab allows one to see, copy and edit (if necessary) the SQL statement that is at the basis of the report. If the SQL statement is modified, the other tabs will be disabled and the SQL statement will prevail.

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6.4.7 Location

6.4.7.1 Overview (Location)

While boxes and tapes are at the record center, they occupy locations.

Transit locations may contain any number of files or boxes of any size. These are defined in the *Building* module, since they are used in special ways. The remainder of box locations are defined in the *Location* module.

Available reports
- list of locations that are full or not, for a specific section at the record center
- report of volume usage

Fields (see the next section)

Tasks
- Adding or editing a location
- Deleting a location
- Auto-creating or deleting many locations
- Change location volume
- Printing laser labels for specific locations
- Printing thermal labels for specific locations
- Exporting location labels to a text file
- Viewing or printing the list of locations
- Viewing or printing the report of volume usage
- Finding a location using a bar code (includes alternate lables)

Distinctive menu options:

File menu
- Auto create locations
- Auto destroy locations
- Change location volume
- Print labels (Laser | Thermal | To file)

Find menu
- Find with Barcode (F8)

Module window:

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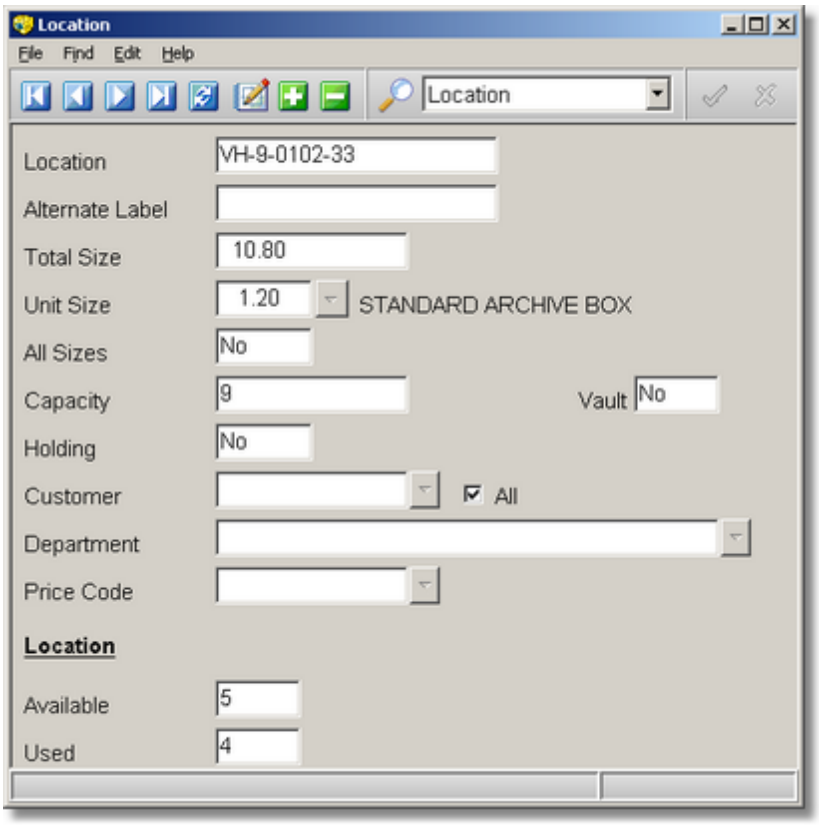

6.4.7.2 Fields (Location)

Location
Field with a mask predefined in the *System Information* 202 module.
This field allows to enter a code for the location, according to the predefined mask. Each location must be clearly identified and the location mask should be carefully thought out so that it accurately reflects the physical storage organization at the record center.

Alternate Label
Alphanumeric field containing a maximum of 20 characters.
This field indicates the alternate label of the location (ex:if the location already had a label before the company transferred to EDC RC software)

Total Size
This field indicates the total quantity of cubic feet that the location can contain. This value is calculated with the multiplication of the value entered in the *Unit Size* field by the value of the *Capacity* field.

Unit Size
Drop-down field associated to a list defined in the *Box Type* module.
This field allows to associate a box type to the location. Normally, boxes of only the same type can be stored in the location. But boxes from a different type can be stored here if the *Bypass volume check* 197 in the *System Information* module is set to "Yes" or the *All Sizes* attribute below is set to *Yes*.

All Sizes
When this field is set to "Yes", it means that the location can contain all the box sizes available.

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Capacity
Numeric field that can contain values "0" to "29999" inclusive.
This field indicates how many boxes the location can contain. It is the quantity of boxes that have a volume equivalent to the value entered in the previous field.

Vault
Choice field that can contain values "Yes" or "No".
When this field is set to "Yes", it means that the location is located in the vault at the record center. These locations are reserved for very important documents that are supposed to be stored in places with a high security level and a controlled environment. For example, when entering a new box in the *Box* module, it is possible to check off a *Vault* option, so that the box will have to be placed in a vault location.

Holding
Choice field that can contain values "Yes" or "No".
When this field is set to "Yes", it means that the location is a holding location. A holding location is usually a temporary location where the boxes wait until they are put in their final locations.

Customer / All
Drop-down field associated to the list of the record center customers, defined in the *Customer Information* module.
A location can be reserved to the exclusive usage of any customer selected here.
When "All" is checked, all the record center customers can store their boxes in that location.

Department
Drop-down field associated to the list of the customer's departments, defined in the *Department* module.
A location can be reserved to the exclusive usage of any department selected here.

Price code
Drop-down field associated to the list of price codes. This field is enabled when the location is assigned to a customer. If a price code is applied here, that price code will be billed to the customer once per storage invoice. This is useful if the customer rents the storage space rather than paying per box.

Location
Available
This field indicates how many items can be added in that location. This field is automatically updated by the system when refiling or retrieving documents, or when manually adjusting the next field.

Used
This field indicates how many items are actually stored in the location. This field is automatically updated by the system when refiling or retrieving documents. But it is possible to manually adjust this field when necessary and to set properly the last two fields of this module.

If this value becomes inaccurate, running the Rebuild Space Usage 454 function will recalculate the number of boxes in each location.

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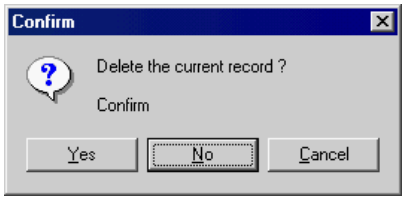
6.4.7.3 Adding or editing a location

1. Click on **Inventory**->**Location** from the *Main Window*.
2. When editing a location, find it before and get it on the screen, then click on **Edit**->**Add**|**Edit**.
3. Enter or modify the desired information in the appropriate fields (see the previous section 377 for more details).
4. Click on the **Accept** button to save changes for the old location or to register the new location.

6.4.7.4 Deleting a location

Sometimes, it is necessary to delete one or more locations. For example, the record center can decide to renovate a part of the storage areas and to build offices instead of locations for documents. Because this old part of the record center is not operational anymore, the related locations must be erased from the system.

1. Click on **Inventory**->**Location** from the *Main window*.
2. Search the desired location and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.



3. Click on the **Yes** button to confirm the deletion. The location is automatically erased in the system.

Note : In order to be deleted, a location must not contain any document. If it does, an error message will appear during the current operation, so it will be necessary to retrieve all the related documents from the location (see the *Internal Transfer List* 434 module or the moving items with the PDT 108).

6.4.7.5 Auto-creating or Auto-destroying many locations

These functions allow the creation or deletion of many locations in the same operation.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (*Start* and *End* fields) is the code of the building in question and cannot be changed.

Auto-create locations

1. Click on **Inventory**->**Location** from the *Main window*.
2. Click on **File**->**Auto Create Locations**. A window appears.

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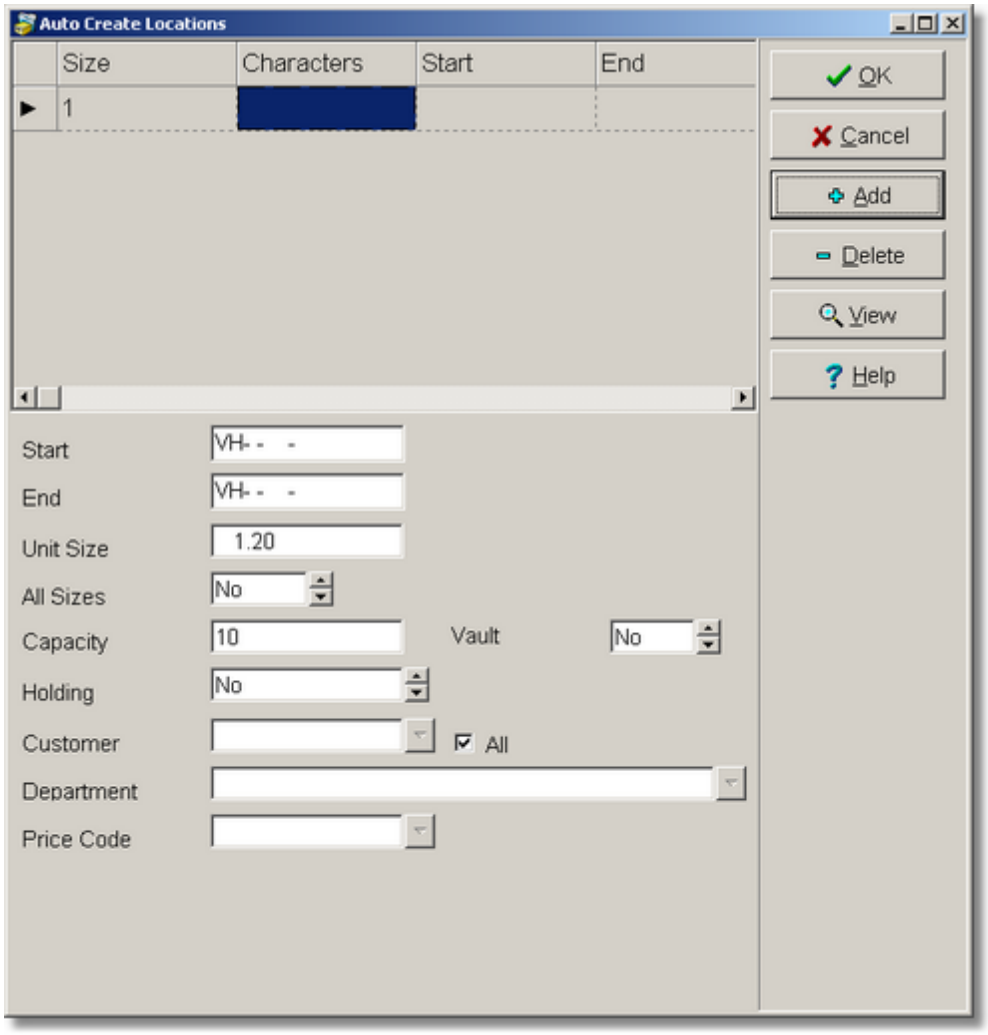

Note : When opening this window for the first time it is empty, but the one shown here is an example when parameters have already been entered for the creation (following operations).

3 Fill in the following fields :

***Start** - This field is used to enter the first location of the interval of locations to create. It should respect the mask for locations defined in the System Information 202 module.
***End** - This field is used to enter the last location of the interval of locations to create. It should respect the mask for locations defined in the System Information 202 module.

***Unit size** - This field is used to enter the quantity of cubic feet for each unit of a location. Most of the time, this unit corresponds to the common volume of boxes or tapes in the *Box* module.
***All sizes** - Check box that is used to specify if all the box sizes are accepted in these locations.

***Capacity** - Numerical field used to enter the quantity of units a location may contain (how many boxes, tapes or any documents whose volume is equivalent).

***Vault** - Check box that is used to specify if the items stored in these locations are in the Vault. If *Yes* is selected, only items that have the vault option checked will be allowed to be stored in these locations.

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***Holding** - Check box that is used to specify if the locations are going to be used for holding purposes.

-- The three following fields are only available when the 'All' check box is unchecked --

Customer - Drop-down list that is used to specify if the locations will be assigned to one of the record center's customers. If one customer is chosen in the list, only this customer's boxes can be put in that location.

Department - Drop-down list associated to the list of the customer's departments. When a department is selected here, the locations are reserved to the exclusive usage of this specific department.

Price code - Drop-down list associated to the list of price codes. Normally a storage price code should be associated to this field. When a price code is assigned to these locations, the boxes that are in that location will be charged using this specific price code.

Note: All the required fields are marked by a star (*).

6 Then click on the **Add** button to enter the parameters that will be used to create the new locations in the system. See the rules for auto-creation 381 for more information.

Note : Each time this operation is performed a line is added at the top of the window opened in **2**. It allows to enter the parameters needed to create each character strings present in a location number. It is essential to be careful when entering these parameters, in order to insure that all the locations included in the chosen interval will be created properly

8 Click on the **View** button to display a list of all the locations that will be added in the system. An error message is displayed when some parameters have not been entered correctly. It is then necessary to find the error and to correct it.

9 When every parameter is set properly, press **OK**. A dialog box appears and asks to confirm the operation.

10 Click on the **Yes** button of this dialog box and the system will automatically create the locations in question.

Rules for auto-creation

In the following example, the location mask is AA-9-9999-99 and the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01).
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :

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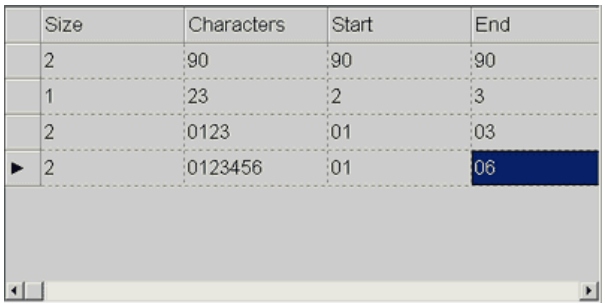


	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
▶	2	0123456	01	06

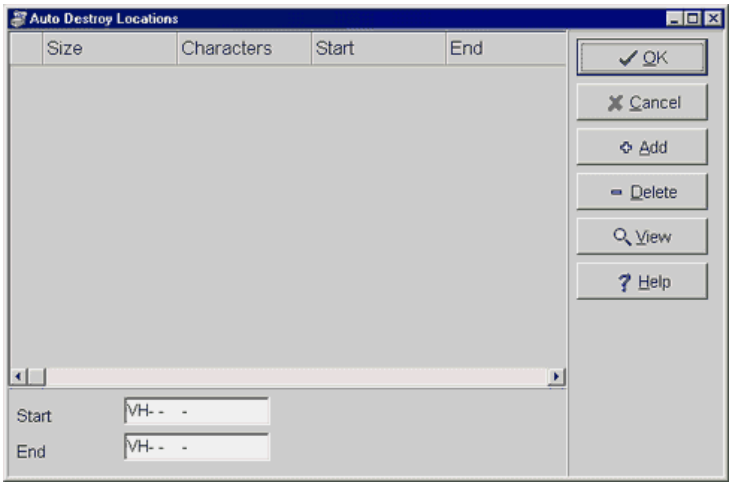
Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

Auto-destroy locations

1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**Auto Destroy Locations**. A window appears.



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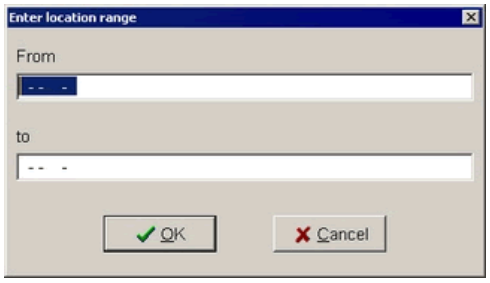
3 Enter the desired parameters as for a creation (see the two previous operations).
4 Click on the **View** button if so desired and press **OK**.
5 Click on the **Yes** button of the dialog box which is displayed in order to confirm the operation. The locations in question will be automatically deleted from the system. Any location that contains documents cannot be deleted as long as these documents are not transferred to another location.

Note : The system keeps in memory the last creation parameters as long as the module is not closed. Then if some locations were just added by mistake, the window for auto-destruction will contain the parameters related to these locations. It will only be necessary to approve their destruction.

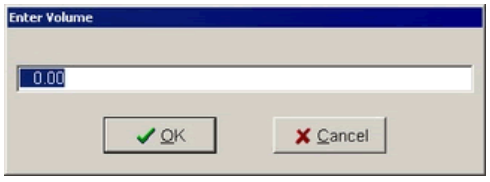
6.4.7.6 Change Location Volume

This allows the record center to change the volume of many locations at a time.
WARNING: This process is **irreversible** and can be tricky if the operation is done unknowingly.

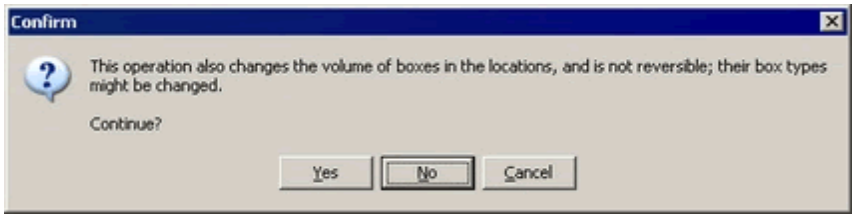
1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**Change Location Volume**. A window appears.



3 Enter a location range and press **OK**. A window appears.



4 Enter the new volume and press **OK**. A message appears.


Confirm
This operation also changes the volume of boxes in the locations, and is not reversible; their box types might be changed.
Continue?
Yes
No
Cancel

5 To continue click on **Yes**. To abort the operation press **No** or **Cancel**.

6.4.7.7 Printing laser labels for specific locations

When a new location is created it is necessary to print the bar code label that will be affixed in front of the location and that may be read when refiling documents. Furthermore, it can be necessary to

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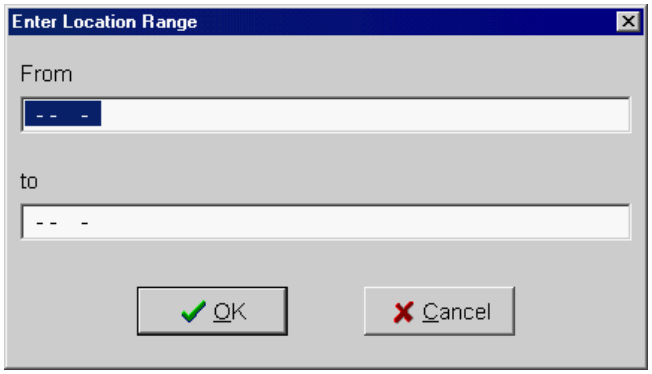
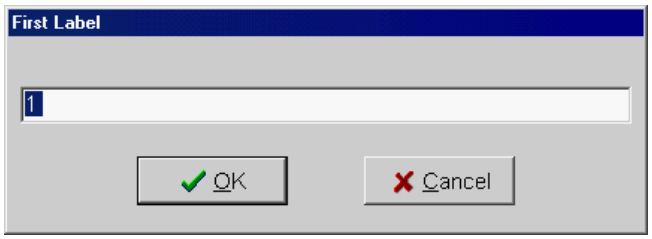
reprint labels when they are damaged and when their bar codes cannot be read anymore.

1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**Print Labels**->**Laser**. A window appears.



3 Enter an interval of locations for which labels are printed and press **OK**. A new window opens.



4 Enter a number to specify where to start on the page of Avery labels that is inserted in the printer and press **OK**.Labels are automatically printed from the default printer.

Shortcut: Shift + F7

***Example:**

6.4.7.8 Printing thermal labels for specific locations

1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**Print Labels**->**Thermal**. A window appears.

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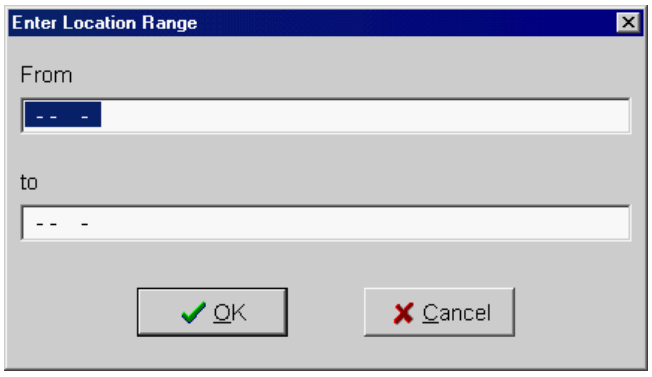
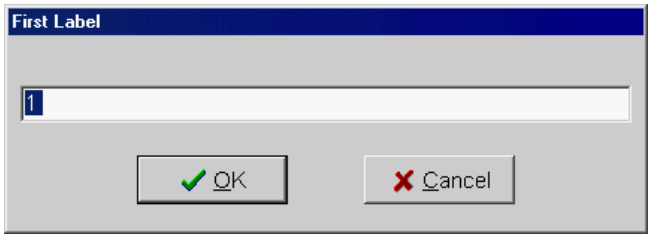


3 Enter an interval of locations and click on the **OK** button. A new window opens.

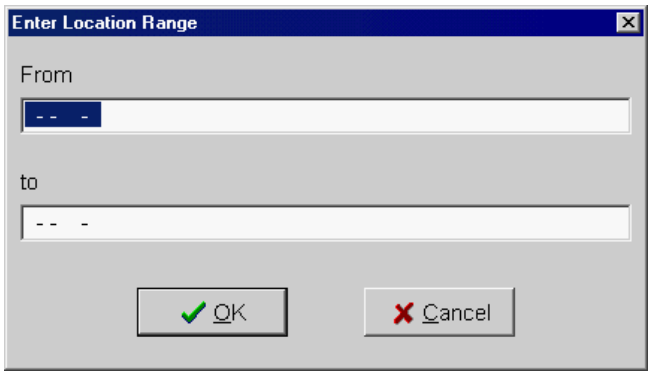


4 Enter a number to specify where to start on the page and click on the **OK** button. Labels are automatically printed from the thermal printer attached to the workstation.

6.4.7.9 Exporting location labels to a text file

A record center may decide to have a third party print its location labels. With this operation, the record center can simply send the location numbers to the third party by email with a text file attached.

1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**Print Labels**->**Export to file**. A window appears, different for each workstation, and asks to enter a file name and directory.
3 Enter a name and select a directory for the exportation then click on the **Save** button (or **Enter**, etc). A window appears.



4 Enter an interval of locations and press **OK**. The locations in question are automatically exported to the text file previously chosen.

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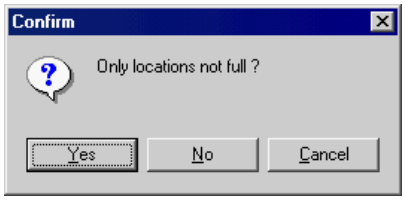
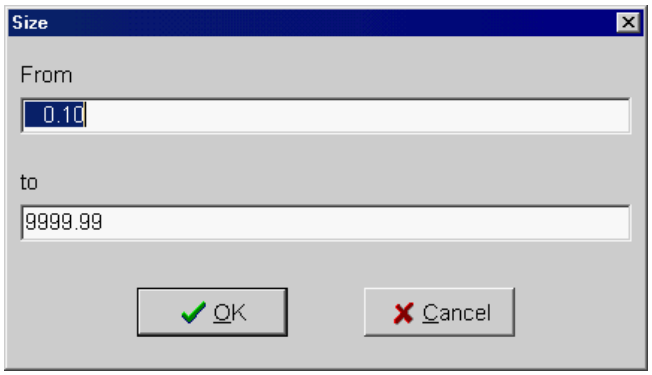
6.4.7.10 Viewing or printing the list of locations

This operation allows to print the list of locations, full or not, that can contain documents of a certain volume and included in a specific range of location numbers.

1 Click on **Inventory**->**Location** from the *Main window*..
2 Click on **File**->**View Report**|**Print Report**->**Location**. A dialog box appears.



3 Click on the **Yes** or on the **No** button, respectively to produce a report including the not full or the full locations. A window appears and allows to enter a range of locations.
4 Enter the range of locations for which the report is produced and press **OK**. A new window opens.



5 Specify an interval of sizes and press **OK**. These sizes correspond to the volume of the items that can contain the locations included on the report (see the *Unit Size* 377 field in the current module). The report is automatically printed or displayed. When viewing the report, click on the **Close** button of the report's window to finish.

6.4.7.11 Viewing or printing the report of volume usage

This operation allows to print a detailed report of space usage for a specific range of locations. The report includes the volume used for each location, the available spaces and the percentage of INs and OUTs.

1 Click on **Inventory**->**Location** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**->**Volume Usage**. A window appears.

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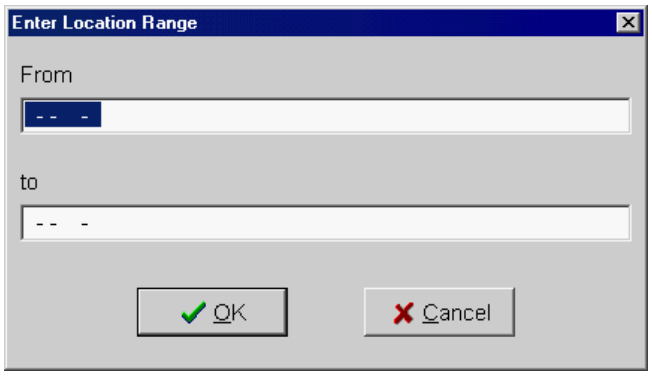

3 Enter an interval of locations for which the report is produced and press **OK**. The report is automatically printed or displayed. When viewing the report, click on the **Close** button of the report's window to finish.

6.4.7.12 Finding a location using a bar code (includes alternate lables)

To navigate to the record of a location using an EDC bar code or alternate label:

1. Open the **Inventory->Location** module.
2. Press the **F8** key, or from the menu, select **Find->Find with bar code**.
3. **Scan** the bar code with a bar code scanner (not the PDT), or type the label and press **Enter**.

EDC will take you to the record for this location.

6.4.8 Shelf Location

6.4.8.1 Overview (Shelf Location)

This module allows the management of locations used to store files on open shelves (versus in boxes) at the off-site record center.

Available reports

- list of open shelf locations 394, for one or all customers, by location, empty shelves, media, occupation date, range, description or quantity

Fields 388 **(see the next section)**

Tasks

- Adding or editing an open shelf location 389
- Deleting an open shelf location 392
- Marking an open shelf location as full or empty 392

Distinctive menu options:

File menu

- Auto create locations 389
- Auto destroy locations 389

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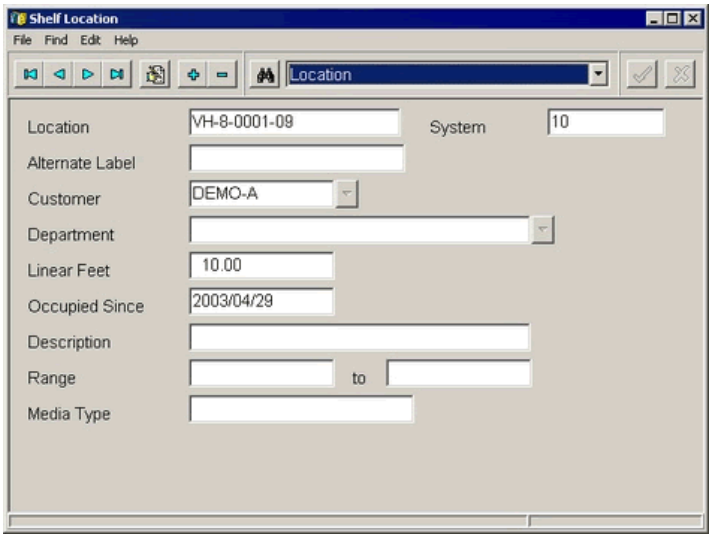
- Print labels->Laser 393
- Print labels->Thermal 393
- Print labels->To file 394

Edit menu

- Set EMPTY 392
- Set OCCUPIED 392

Module window:



6.4.8.2 Fields (Shelf Location)

Location
Unique code for the location that must match the location mask defined in the system information 202 module. This code should be consistent with the location-labeling logic of the record center for efficient picking.

Alternate Label
Alphanumeric field containing a maximum of 20 characters.
This field is typically used for connecting a location with a label that was in place before the record center implemented EDC RC.

System
This unique identifier is assigned by the system and is unmodifiable

Customer / Department
Because open shelf files are not in boxes and storage is billed by linear foot, each shelf location must be assigned to a specific customer by entering a customer key or selecting the customer from the drop-down list. If the customer billing is by Department, then each location must also be assigned to a department.

Linear Feet
The length of the location may range from "0.00" to "9999.99". This is used in calculating storage charges.

Occupied Since

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Unmodifiable date field that records the date on which the location first contained an item or was manually marked as occupied. (see "Marking an open shelf location as full or empty 392"). This date is used in calculating storages costs for the customer to whom the location is assigned.

Description
Alphanumeric field that allows the user to enter a description for the location, for customer reference.

Range from/to
This field accepts the range of files contained in the location, and may be used by customers for reference purposes.

Media Type
Alphanumeric field for customer reference. For example, a hospital, may specify in which locations there are x-rays and in which there are regular medical sheets.

6.4.8.3 Adding or editing an open shelf location

1. Open the **Inventory->Shelf Location** module.
2. Navigate to the location to be edited and select **Edit->Edit**, or select **Edit->Add** to add a new one.
3. Enter or modify the desired information in the appropriate fields (see the previous section 388 for more details).
4. Click on the **Accept** button to save changes or to register the new shelf location.

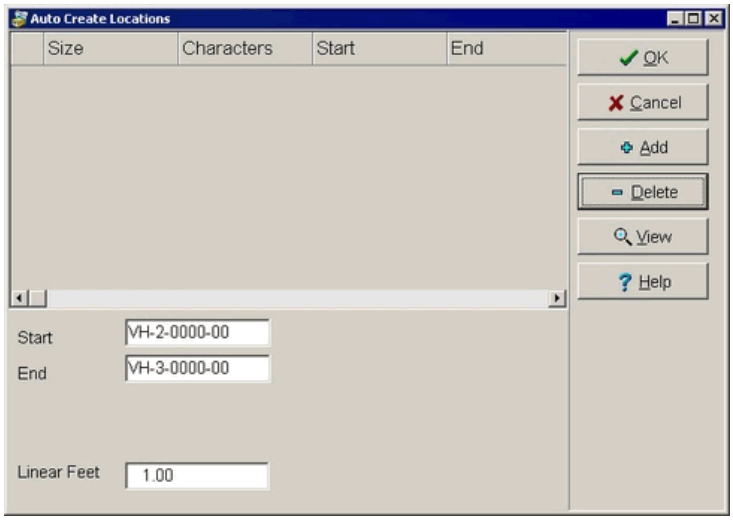
6.4.8.4 Auto-creating or Auto-destroying shelf locations

Auto-creating shelf locations

This function allows the creation of many shelf locations in the same operation.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (*Start* and *End* fields) is the code of the building in question and cannot be changed.

1 Click on **Inventory**->**Shelf Location** from the *Main window*.
2 Click on **File->Auto Create Locations.** A window appears.



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3 Move to the *Start* and *End* fields at the bottom of the window then enter the interval of locations to create. These fields respect the mask for locations defined in the *System Information* 202 module.
4 Move to the *Linear Feet* field and enter the quantity of feet for each unit of a location. Most of the time, this unit corresponds to the length of your shelves.
5 To add a location press on the **Add** button.

Note : Each time this operation is performed a line is added at the top of the window opened in **2**. It allows to enter the parameters needed to create each character strings present in a location number. It is essential to be careful when entering these parameters, in order to insure that all the locations included in the chosen interval will be created properly.

6 Click on the **View** button to display a list of all the locations that will be added in the system. An error message is displayed when some parameters have not been entered correctly. It is then necessary to find the error and to correct it.
7 When every parameter is set properly, click on the **OK** button. A dialog box appears and asks to confirm the operation.
8 Click on the **Yes** button of this dialog box and the system will automatically create the locations in question.

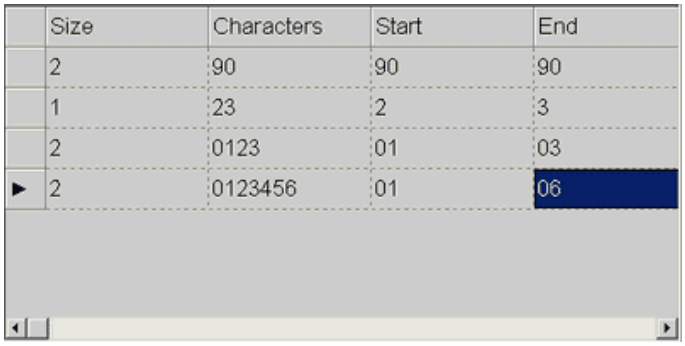
Rules for auto-creation

In the following example, the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01 ... VH-0**4**01-01).
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :



	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
▶	2	0123456	01	06

Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when

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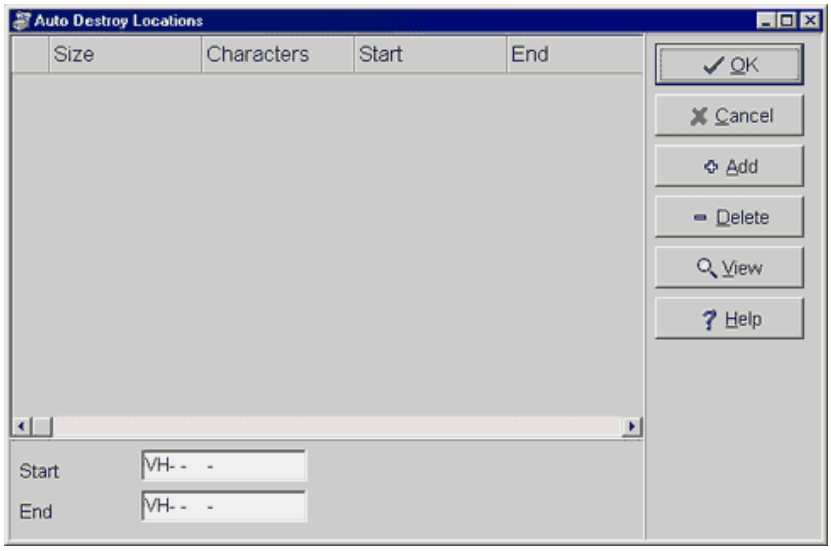
it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

Auto-destroy shelf locations

1 Click on **Inventory**-> **Shelf Location** from the *Main window*.
2 Click on **File**->**Auto Destroy Locations**. A window appears.



3 Enter the desired parameters as for a creation (see the previous operations).
4 Click on the **View** button if so desired and click on the **OK** button.
5 Click on the **Yes** button of the dialog box which is displayed in order to confirm the operation. The locations in question will be automatically deleted from the system. Any location that contains documents cannot be deleted as long as these documents are not transferred to another location.

Note : The system keeps in memory the last creation parameters as long as the module is not

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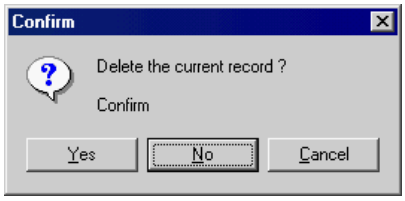
closed. Then if some locations were just added by mistake, the window for auto-destruction will contain the parameters related to these locations. It will only be necessary to approve their destruction.

6.4.8.5 Deleting an open shelf location

As it is sometimes necessary to delete regular locations, it can be necessary to do the same for shelf locations. Here is the operation that allows to perform that deletion.

1 Click on **Inventory**->**Shelf Location** from the *Main window*.
2 Search the desired shelf location and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. The shelf location is automatically erased in the system and will not appear anywhere, especially in the list of shelf locations available for refiling in the *Delivery Return* module.

Note : In order to be deleted, a shelf location must be empty. If there are any documents left in the location, an error message will appear during the current operation, so it will be necessary to retrieve all the documents from the location (see the *Internal Transfer List* 434 module).

6.4.8.6 Marking an open shelf location as full or empty

The first time an inventoried file is placed on a shelf, the bar code of the file and the shelf location are scanned with the bar code reader. The current date is automatically put in the *Occupied Since* field of the present module and the billing for this shelf location is starting. But there is a problem when storing non track files, that represent the major part of documents stored on open shelf locations.

Since this document type does not have a bar code label, when storing a non track file for the first time on a shelf it is not possible to register the operation and to start the billing for the current shelf location. That is why the present operation was created, in order to allow the record center to manually indicate when a shelf location is used for the first time in that particular situation.

In the same way, the record center can manually indicate the final retrieval of all the non track files stored on a same shelf location, so that the storage fees must not be charged anymore.

1 Click on **Inventory**->**Shelf Location** from the *Main window*.
2 Search the shelf location to which the non track files are inserted or final removed.
3 Click on **Edit**->**Set EMPTY|Set OCCUPIED**. Accordingly to the operation that is performed, the system automatically puts the current date in the *Occupied Since* field or delete any date that was present in it.

Note : When there are documents left on the shelf location, it cannot be marked as being empty. It is necessary to transfer all these documents by creating an internal transfer list.

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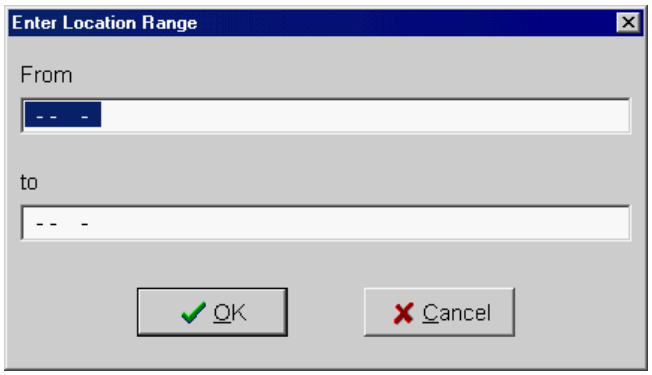
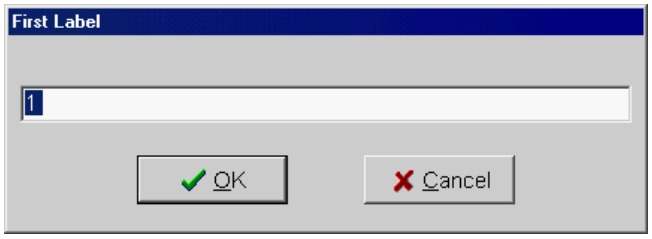
6.4.8.7 Printing laser labels for specific locations

1 Click on **Inventory**->**Shelf Location** from the *Main window*.
2 Click on **File**->**Print Labels**->**Laser**. A window appears.



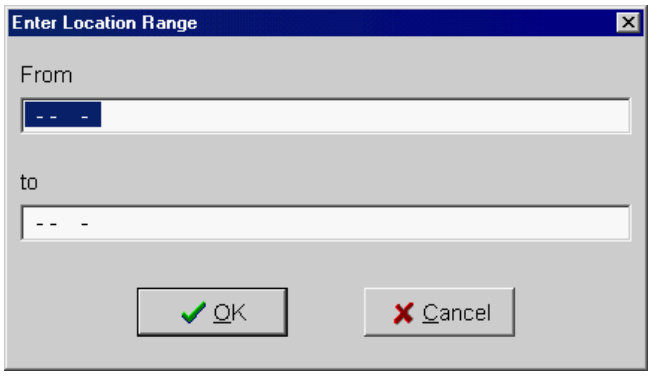
3 Enter an interval of shelf locations for which labels are printed and click on the **OK** button. A new window opens.



4 Enter a number to specify where to start on the page that is inserted in the printer and click on the **OK** button. Labels are automatically printed on the default printer.

6.4.8.8 Printing thermal labels for specific locations

1 Click on **Inventory**->**Shelf Location** from the *Main window*.
2 Click on **File**->**Print Laser**->**Thermal**. A window appears.



3 Enter an interval of shelf locations and press **OK**. A new window opens.

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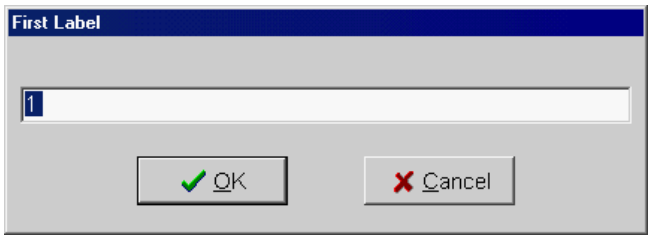
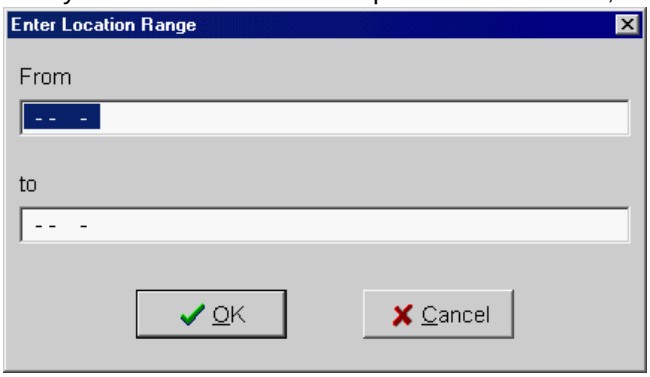


4 Enter a number to specify where to start on the page and press **OK**. Labels are automatically printed from the thermal printer attached to the workstation.

6.4.8.9 Exporting location labels to a text file

It is possible to export location labels to a text file, should you wish to have these labels printed outside EDC.

1. Open the **Inventory->Shelf Location** module.
2. From the menu select **File->Print Labels->Export to file**. A window prompts for a file name and directory to save to.
3. Once you have entered and accepted this information, a window appears.



4. Enter an interval of shelf locations and press **OK**. The locations in question are exported to the specified text file

6.4.8.10 Viewing or printing the list of open shelf locations

1. Open the **Inventory->Shelf Location** module.
2. Click on **File->View Report|Print Report** and select one of the available sub-menus. The system will prompt for any required information then produce the report.

6.4.9 Activity Report

6.4.9.1 Overview (Activity Report)

This module creates reports based on the history of boxes and files

Available reports

- Box activities 396
- File activities 396
- Overdue memos 399

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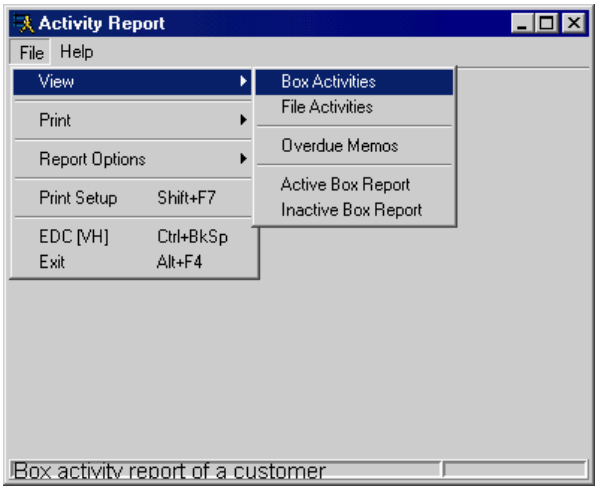
- Active box report 398
- Inactive box report 398

Fields (None)

Tasks
- Choosing the predefined report and editing its fields 395
- Viewing or printing an activity report for boxes or files 396
- Viewing or printing the report of active or inactive boxes 398
- Viewing or printing overdue memos 399
- Creating a report of overdue memos for a specific customer 399.

Distinctive menu options: (None)

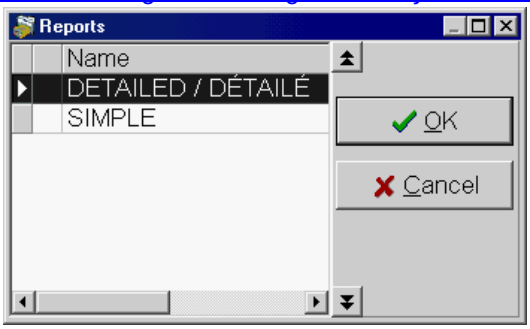
Module window:



6.4.9.2 Choosing the predefined report and editing its fields

To select one of these layouts for an activity report:

1. Open the **Inventory->Activity Report** module
2. Select **File->Report Options->Box|File->Select Predefined Box|File Report**. A list of reports defined through the Management->System Information module 217 appears.



3. Select the desired report and press **OK**.

To edit the report fields for this session:

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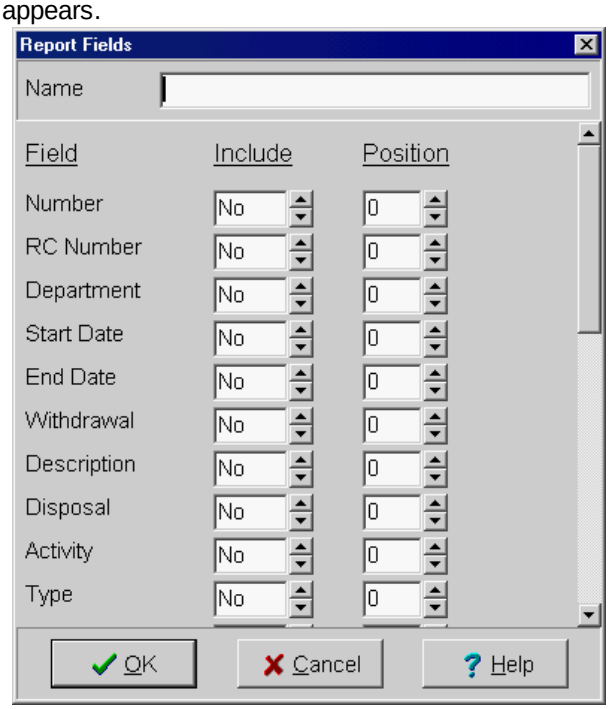
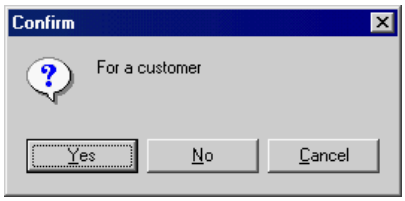
4. Click on **File->Report Options->Box|File->Modify Box|File Report Fields**. A window appears.



5. Set the value in the **Include** column for a field to *Yes* to include it, or to *No* to exclude it.
6. Adjust the value in the **Position** column to change the order of columns in the report.
7. Press **OK** to save changes.

6.4.9.3 Viewing or printing an activity report for boxes or files

1. Open the **Inventory->Activity Report** module.
2. To customize the report fields, select or modify a predefined report 395.
3. Click on **File->View|Print->Box|File Activities**. A dialog box appears.



4. Click on the **Yes** button to specify a customer, or **No** to include all customers. When producing a report for an individual customer, you may also specify a department. Once these questions are answered, a window appears.

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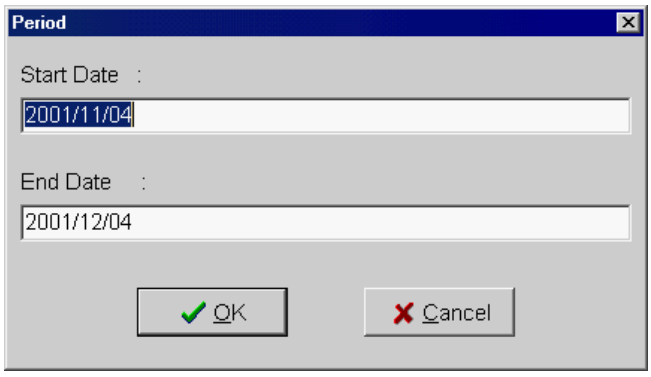
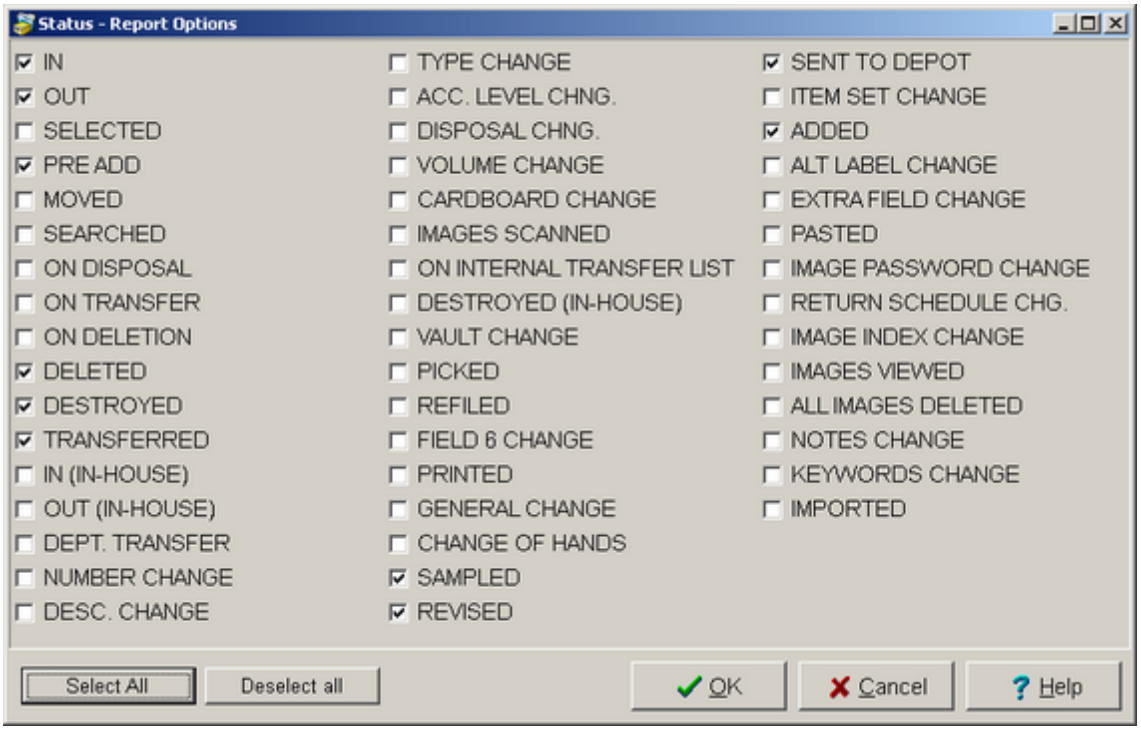


5. Specify the **Start date** and the **end date** for the report and press **OK**. A new window opens on the screen.



Note : The Chng. abbreviation means that the given parameter has changed. (ex: Disposal Chng means that the disposal of the document has been changed). A report can be produced for all activities included in the history of a document. Most of the options displayed in this window relate to different states[33] a document can take in its during its history with the record center.

6. Select the activities to capture in the report, then press **OK**.
7. The report is printed or displayed, depending on which menu option was initially selected. When viewing a report, click on the **Close** button of the report's window to go back into the module.

Note : The default report will be used if step 2 is skipped. Furthermore, the first three fields of the reports are fixed and cannot be modified.

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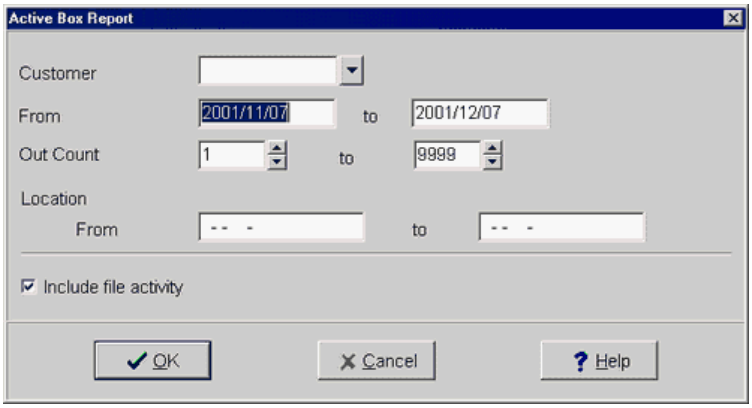
6.4.9.4 Viewing or printing the report of active or inactive boxes

Producing a report of active boxes

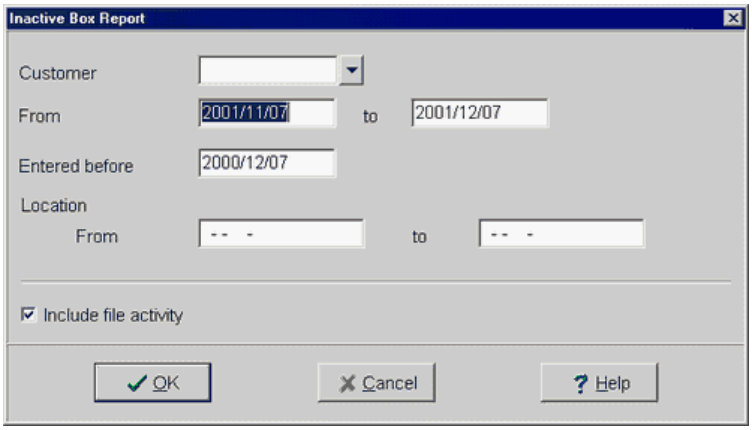
1. Open the **Inventory->Activity Report** module.
2. Select **File->View|Print->Active Box Report**. A window appears.



3. In the **Customer** field, specify a customer key, or leave it blank to include all customers
4. In the **From/to** fields, specify the range of dates to consider activity over.
5. In the **Out Count/to** fields, specify how many times the box must have gone out to be considered active.
6. In the **Location From/to** fields, you may specify a range of record center locations to consider
7. Check the **Include file activity** box if you wish to include the activity of files within the boxes. This will also cause file retrieval to be included as an activity for the box that it was in.
8. Click **OK**. The report will be produced.

Producing a report of inactive boxes

1. Open the **Inventory->Activity Report** module.
2. Select **File->View|Print->Inactive Box Report**. A window appears.



3. In the **Customer** field, specify a customer key, or leave it blank to include all customers
4. In the **From/to** fields, specify the range of dates over which to consider activity.
5. In the **Location From/to** fields, you may specify a range of record center locations to consider
6. Check the **Include file activity** box if you wish to include the activity of files within the boxes. This will also cause file retrieval to be included as an activity for the box that it was in.

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7. Click **OK**. The report will be produced.

6.4.9.5 Viewing or printing overdue memos

Records that are *OUT* from the record center to a customer are still considered part of the record center inventory. Storage is typically charged for reserving space for them, as it is expected that these items will return.

Overdue memos are used to notify customers which items have not returned in a while, so that the customer can decide whether to mark them as permanently out to cancel storage charges, or return them if appropriate.

1. Click on Open the **Inventory->Activity Report** module.
2. Click on **File->View|Print->Overdue Memos**. A window appears.
3. Enter the customer key or select it from the list, and press **OK**. A window appears.
4. Specify a date interval for when the unreturned items last went out, and click on the **OK** button. The overdue memos will produced.

6.4.9.6 Creating a report of overdue memos for a specific customer

Overdue memos are based on a template that can be modified for all customers or individual customers as follows:

1. Using your operating system's browser, navigate to EDC RC's data directory. (e.g. d:\docudata\EDCRC\Data)
2. Located the file called "DEFAULT.F01", and open it with a text editor such as notepad. (You might want to create a back-up copy of this file first.)
3. Before modifying the document, click on **File -> Save As**.
4. Save the document in the same directory. replacing "default" with the customer key to make it customer-specific.(ex: if one wants to create an overdue memo report for customer with the key DEM01, one will save the document as "DEM01.F01")
5. Modify the text in the memo, but in all cases do not modify "$user$" or "$date$", since these are used by the software to recognize and organize the data.
6. When all the changes have been performed, click on **File -> Save** and close the document.
7. View or print overdue memos 399 (choose the same customer for which you have created a customised report so the software will recognise the customer key in the name of the report and will import it).

IMPORTANT: One must never delete or write over the default templates ("DEFAULT.F01") since they are unique and cannot be copied from anywhere else if deleted.

Note: One can create one such customized report per customer key.

6.4.10 Disposal List

6.4.10.1 Overview (Disposal List)

The process of disposing of boxes and files for customers at the end of their retention period is tightly regulated. Multiple authorization and verification steps protect against inadvertent destruction of incorrect items. (See the procedures for destroying items 149.)

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Available reports

- For customer (authorization list of documents to be disposed of 411)
- Pallet (picking list of items to be disposed on a pallet 412)
- Pallets for list (pallets related to the current list 412)
- View | Print volume (volume of boxes to be disposed of 412)

Fields 401 **(see the next section)**

Tasks

- Using the PDT when destroying by pallet 410
- Editing or deleting a CREATED transfer list 413

Distinctive menu options:

File menu

- Create list 402 (Manually creating a disposal list 402)
- Auto create 405 (Auto-creating a disposal list 405)
- Multi-client auto create 405
- Authorize 409
- Create by-pallet lists 406
- Processing
  - Send pallet picking list to PDT 407
  - Receive pallet picking list from PDT 408
  - Receive pallet verification list from PDT 408
  - Reset pallet 408
  - Reprint Pallet label 408
  - Delete images/documents related to pallet 412
- Delete list 413
- Find destruction list 413

View

- Items 410
- Notes 410
- Authorized users 411 (Viewing authorized users who can approve disposal lists 411)

Edit menu

- Add boxes | from list | from text file 402
- Notes 410
- Remove items 413
- Remove items, change date 413
- Remove authorized items 415
- Disposal type change 402

Module window:

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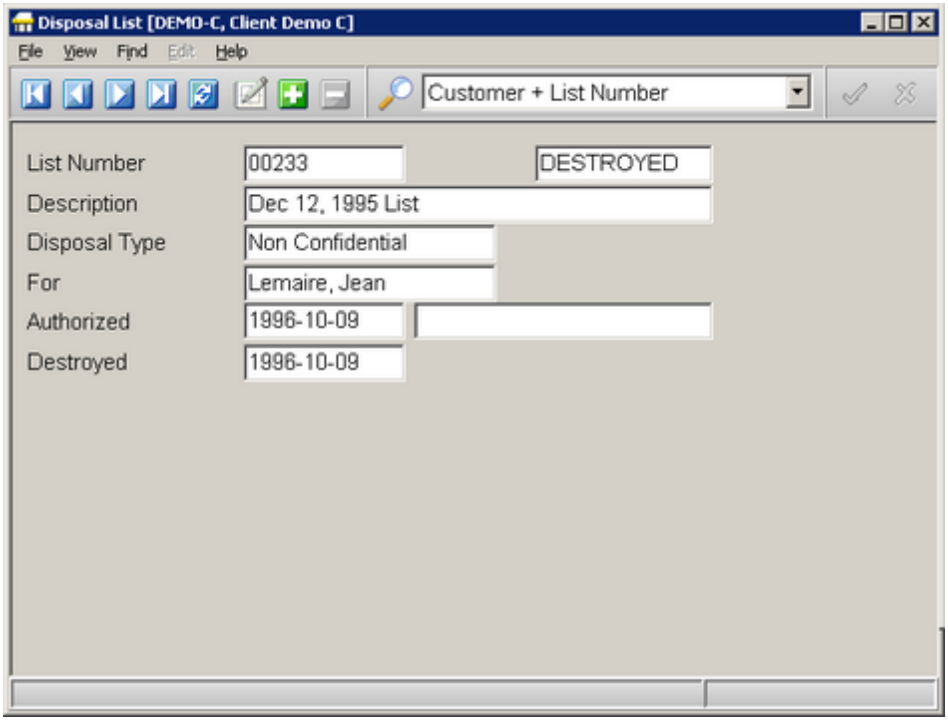

6.4.10.2 Fields (Disposal List)

List Number
Number generated by the system to identify the list. A number with a decimal indicates that a list has been reset so changes could be done.

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can be edited or deleted);
LOCKED : the list has been printed and sent to the customer for authorization. It still can be reset for deletion or changes;
AUTHORIZED : the list has been returned properly signed and authorized to the record center. It cannot be edited or deleted anymore;
DESTROYED: the list has been processed and the concerned documents have been disposed according to the chosen mode.

Description
Description of the current list.

Disposal Type
This field can take values "Confidential", "Non confidential", "Send to depot", "Sample" or " Revision".
It indicates the disposal mode that will be used to dispose of the documents (see the glossary 727 for more details on disposal modes).

For
Indicates the authorized user for whom the list has been created.

Authorized

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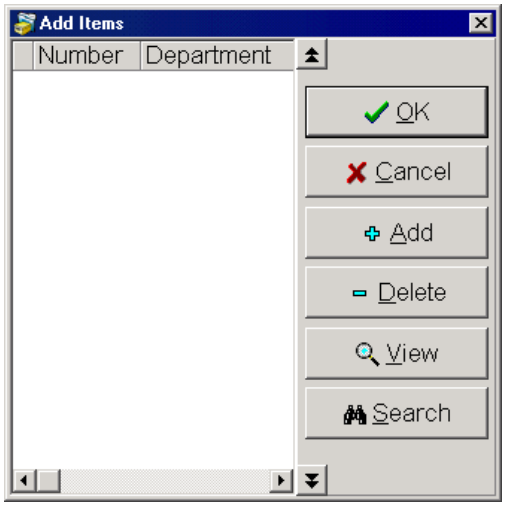
Indicates the date when the list has been authorized.

Destroyed
Indicates the date when the list has been destroyed.

6.4.10.3 Manually creating a disposal list

1. Click on **Inventory**->**Disposal List** from the *Main window*.
2. Click on **File**->**Create List**. A window appears and asks to enter a customer code.
3. Enter the code of the customer in question and press **OK**. A new window appears and displays the list of its users.
4. Select a user and press **OK**. The system generates a new list whose number follows the number of the last list created for this customer. The user selected before appears in the *For* field.
5. Enter a summary description for the list.
6. Move to the *Disposition Type* field and click on the drop down buttons to select the desired disposal mode then click on the **Accept** button.
7. Perform one of the following operations :

- To add items, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.



Click on the **Add** button and select the desired items (they will appear highlighted) on the list that is displayed or click on the **Delete** button to remove items from the disposal list. As soon as a document is added to the disposal list, its state is changed to ON DISPOSAL in the *Box* and *File* modules.

Note : The documents added to the list must be IN. If they are not, the system will prevent their addition to the disposal list. An error message will also appear if there is a conflict with the disposal mode of a document or when a restriction is granted to a document.

- To add items by performing a search, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.

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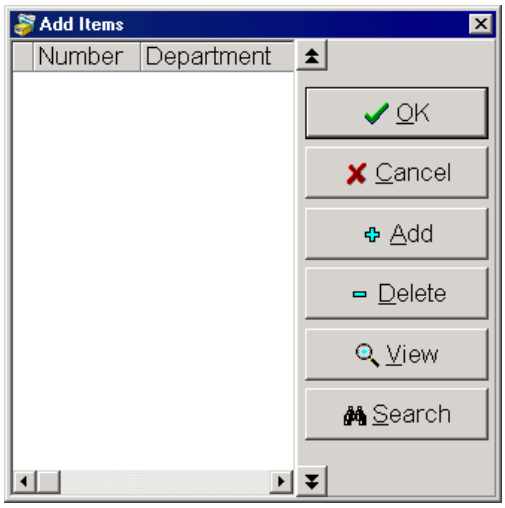
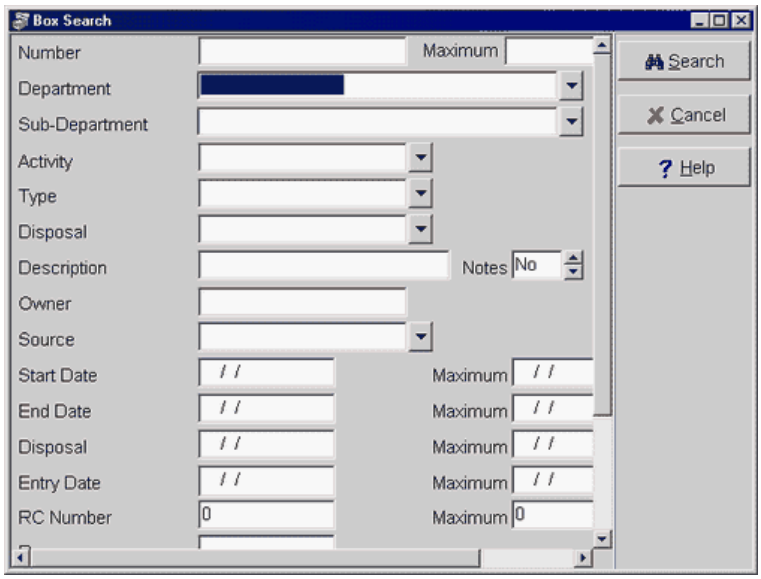


Click on the **Search** button. A new window opens on the screen.



Enter the desired search criteria and click on the **Search** button. The system proceeds to the search and automatically adds to the disposal list all the documents containing the specified search criteria. The search process is the same as when performing a search through the *Search* 350 module.

- To remove items, click on **Edit**->**Remove Items**. A window appears and asks to enter a number to indicate where to start in the selection list. Proceed and press **OK**. The list of items appears.

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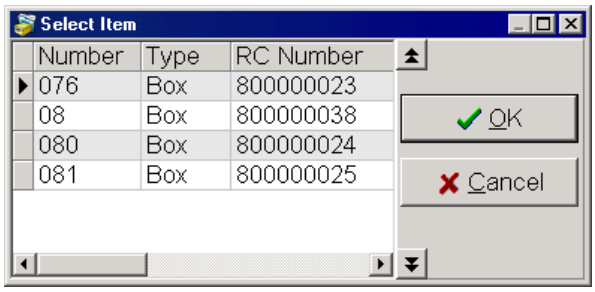
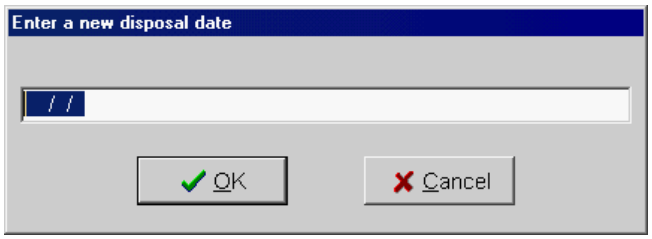


Note : This window contains all the items previously added to the disposal list.

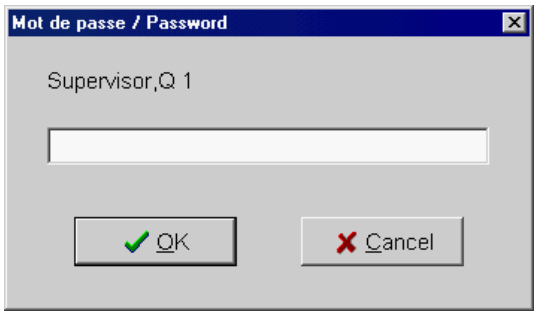
Select the desired items (they will appear highlighted) and press **OK**. The items are automatically removed from the disposal list and their state becomes IN.

- To remove items and edit their disposition date, click on **Edit**->**Remove Items, Change Date** . A window appears same as for a simple removal. Enter a number to indicate where to start in the selection list and press **OK**. A window appears, containing all the items previously added to the disposal list. Select an item and press **OK**. A new window opens on the screen.



Enter a new disposal date for the item and press **OK**. The box or file in question is removed from the list, its state becomes IN and its disposition date is updated in the *Box* and *File* modules.

- To add or edit notes, click on **Edit**->**Notes**. A report's window appears. Enter new notes or edit the existing ones and press **OK** when finished.
- To edit the disposal type, click on **Edit->Disposal Type Change**. A window appears.



Enter the password and press **OK**. A list of disposal types is shown. Select the type (it will appear highlighted) and press **OK**. The disposal type will be changed.

The disposal list is ready to be verified and to be sent to the customer. It will be necessary to wait for the signed authorization before proceeding to the disposal of the documents, according to the chosen disposal mode.

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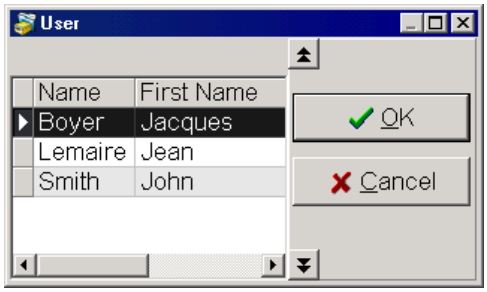
6.4.10.4 Auto-creating a disposal list

The auto-creation of a disposal list allows to batch add boxes that correspond to some given criteria and whose disposal dates are included in a same range of dates.

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**Auto Create**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the customer in question and press **OK**. A window appears.



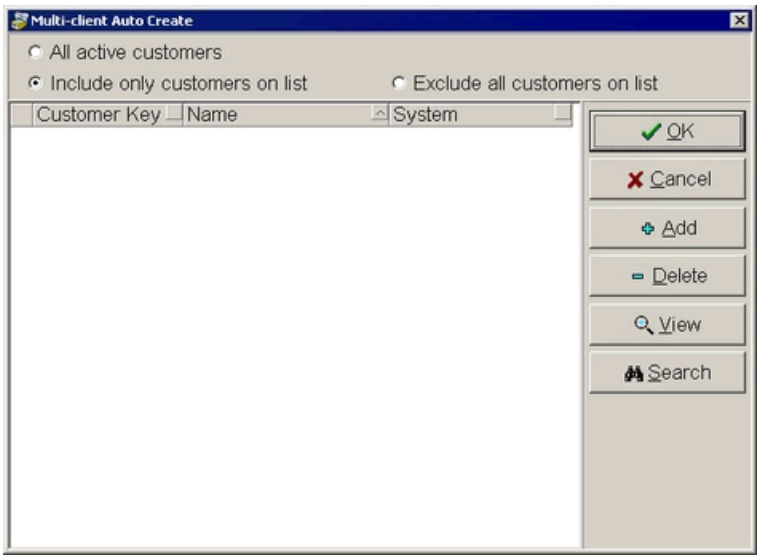
4 Select a user and press **OK**.
5 Enter a summary description for the list.

The list is ready to be verified, printed and sent to the customer for authorization. Before being printed for authorization, items or notes can be manually added, edited or removed from the list, such as described in the step **6** of the previous section 417.

6.4.10.5 Auto-creating a disposal list for multiple clients

The Multi-client Auto Create option allows to batch add boxes from clients whose disposal dates are included in the same range of dates.

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**Multi-client Auto Create**. A window appears.



3 Select a type of list (All active customers / Include only customers on list / Exclude all

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customers on list)

- To add a customer to the list :

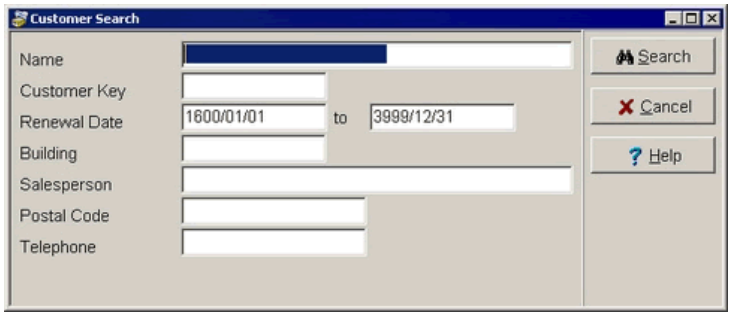
1 Press the **Add** button.
2 Select a customer (to have the list of customers press **OK ----** the customer selected will appear highlighted)

- To delete a customer from the list :

1 Select a customer in the list (it will appear highlighted)
2 Press the **Delete** button

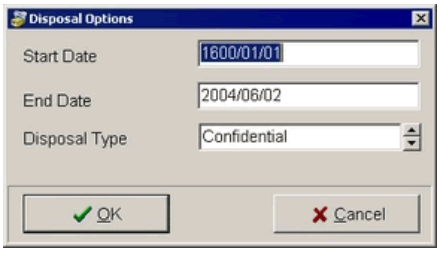
- To add customers to the list by performing a search :

1 Click on the **Search** button. A window appears.



2 Enter the desired search criteria and click on the **Search** button. The system proceeds to the search and automatically adds to the disposal list all the documents containing the specified search criteria.

3 When all the changes and additions have been made to the list. Press **OK**. A window appears.



4 Select the different disposal options. Press **OK**.
5 The list will automatically be created and shown.

6.4.10.6 Creating destruction lists by-pallet

1 Click on **Inventory -> Disposal** list from the *Main window*.
2 Click on **File -> Create By-Pallet Lists**. A window appears, displaying the authorized lists and the number of boxes on each.

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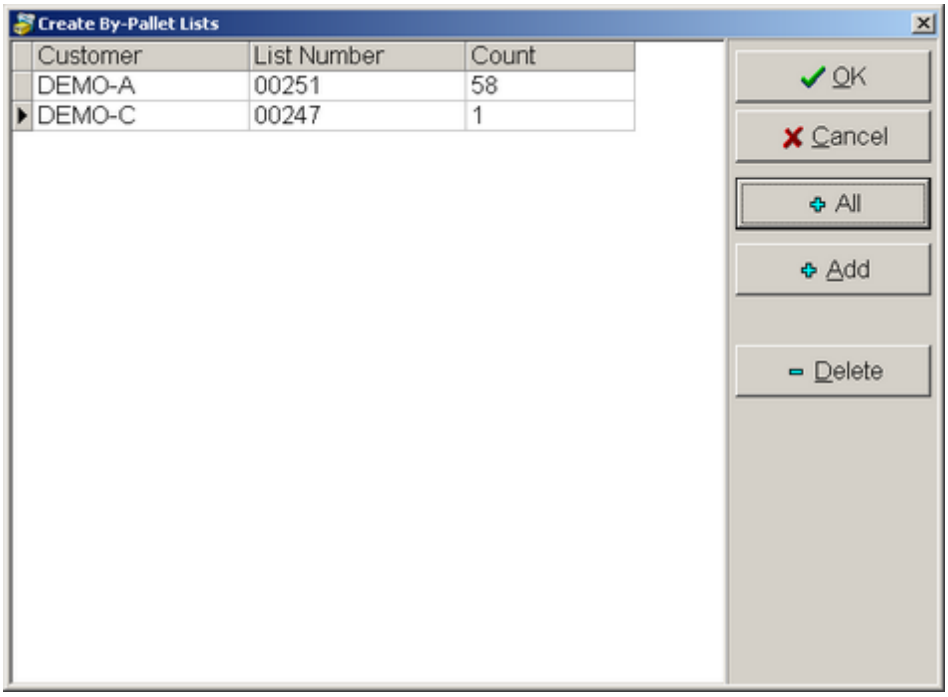


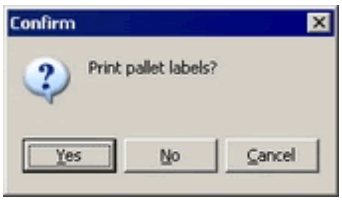
3 Specify the lists that will be on the final processing list

- To add all the lists that are in the Authorized state, click on the **All** button. The lists will be added automatically.

- To add a list press the **Add** button. Enter the customer key or press **OK** to have the list of customers (select a customer on the list, it will appear highlighted, and press **OK**). Press **OK**. Enter the list number and press **OK**.

- To delete a list from the selection, select a disposal list in the list (it will appear highlighted) and press the **Delete** button.

4 When all the changes have been made, press **OK**. A window appears.



- To print the pallet labels, click on *Yes*. Pallet labels will automatically be printed on the default thermal printer.
- If you do not wish to print the labels click on *No* or *Cancel*.

6.4.10.7 Sending the pallet picking list to the PDT

1 Click on **Inventory -> Disposal** list from the *Main window*.
2 Click on **File ->Send Pallet picking list to PDT**
3 An information message appears asking to prepare the PDT.
4 Prepare the PDT to receive information by pressing **1-Receive.**

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6.4.10.8 Receiving the pallet picking list from the PDT

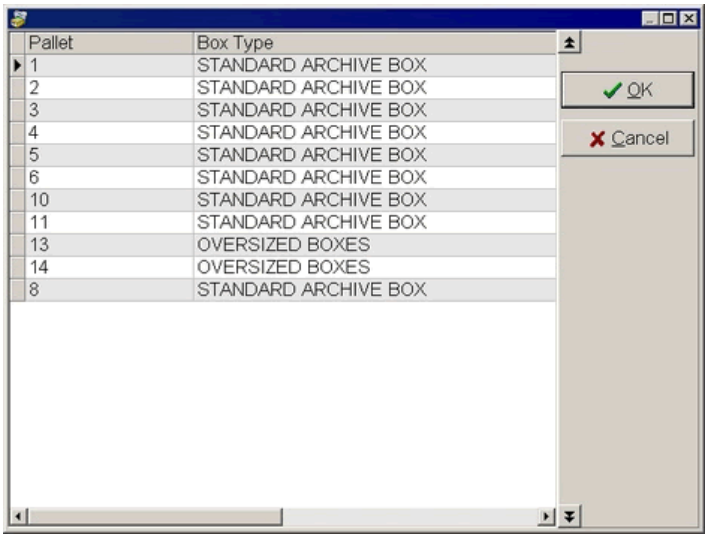
1. Click on **Inventory -> Disposal** list from the *Main window*.
2. Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3. Click on **File ->Receive Pallet picking list from PDT**

6.4.10.9 Receiving the pallet verification list from the PDT

1. Click on **Inventory -> Disposal** list from the *Main window*.
2. Prepare the PDT to send information by pressing **2-Send Results -> 9-Pallet Verif.**
3. Click on **File ->Receive Pallet Verification list from PDT**
4. As soon as the results are uploaded, a report of errors will be displayed.
5. If all the items have been verified, the system will ask you if you want to print the delivery slip. Click on *Yes* to print it, and *No* or *Cancel* to abort the printing.

6.4.10.10 Resetting a pallet

1. Click on **Inventory -> Disposal** list from the *Main window*.
2. Click on **File -> Reset Pallet**. A window appears with the list of all pallets that are not destroyed.



3. Select the pallet you want to reset (it will appear highlighted) and press **OK**.
4. The pallet picking list will be reset (the pallet will appear on the list when sending a pallet picking list to the PDT).

6.4.10.11 Reprinting pallet labels

1. Click on **Inventory -> Disposal** list from the *Main window*.
2. Click on **File -> Reprint Pallet Label**. A window appears with the list of all pallets that are not destroyed.

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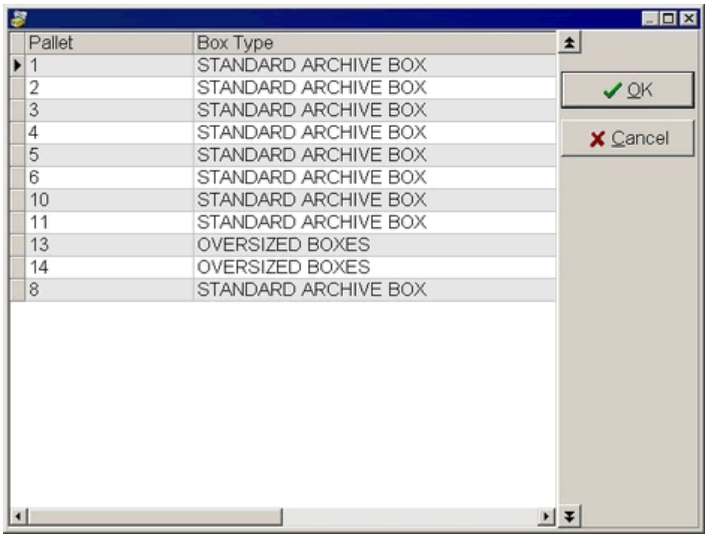


3 Select all the pallet labels you want to reprint (they will appear highlighted) and press **OK**.
4 The labels will be printed on the thermal printer.

6.4.10.12 Authorizing a disposal list

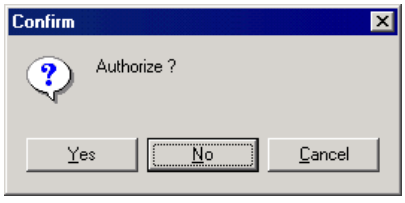
After having been created, a disposal list may be printed for authorization (see "Viewing the items on a disposal list 410") and sent to the customer. The customer will have to check the list, sign it and return it to the record center. The list is then ready to be processed.

Consequently, the processing of the list must respect the following steps in that order : the authorization of the list, the picking of the items, the verification of the picked items and the destruction of these items according to the chosen disposition mode. (See also the Destroying items 149 topic.)

For the subsequent operation, we will consider that a disposal list has been created and locked, and that the list is on the screen and is waiting to be processed.

*Authorizing the list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Find the desired list and keep it on the screen. Its status must be CREATED or LOCKED.
3 Click on **File**->**Authorize**. A dialog box appears.



4 Click on the **Yes** button to confirm the operation The status of the list becomes AUTHORIZED and the items can be picked.

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6.4.10.13 Using the PDT when destroying by pallet

*Picking items to put on a pallet

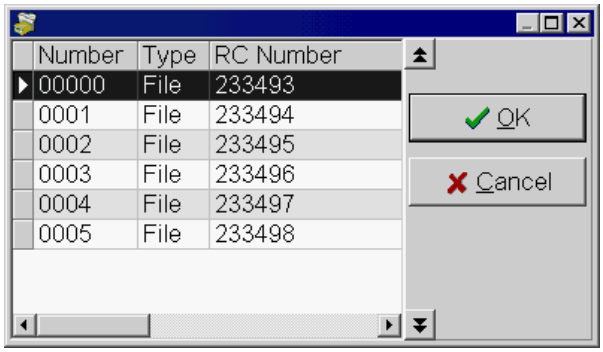
1. Send the pallet picking list to the PDT 407
2. On the PDT press **3-Processing -> 8-Pallet Pick**
3. Press the number of the list you want to pick
4. Scan the pallet label
5. Pick and scan the items that appear on the screen
6. When all the items have been picked, the PDT goes back to the main menu
7. Send the pallet picking list back to the software 408

*Verifying items on a pallet

1. On the PDT press **3-Processing -> 9-Pallet Verif.**
2. Scan the pallet label
3. Scan all the items on the pallet
4. When all items are scanned, scan the pallet label to close the list.
5. Send the pallet verification list back to the software 408

6.4.10.14 Viewing the items on a disposal list

1. Click on **Inventory**->**Disposal List** from the *Main window*.
2. Find the desired list and keep it on the screen.
3. Click on **View**->**Items**. The report's window opens.



4. Press **OK** when finished.

6.4.10.15 Viewing or editing notes on a disposal list

1. Click on **Inventory**->**Disposal List** from the *Main window*.
2. Find the desired list and keep it on the screen.
3. Click on **View**->**Notes**. The report's window appears.

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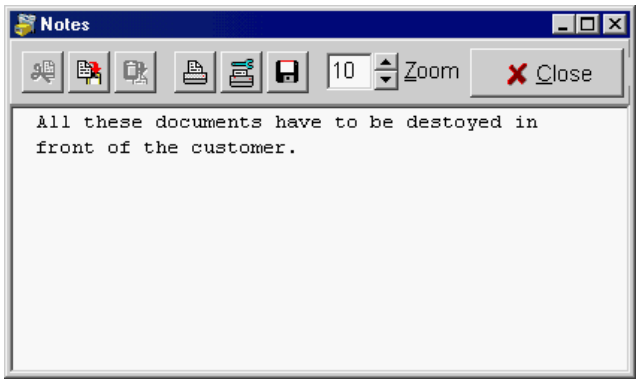
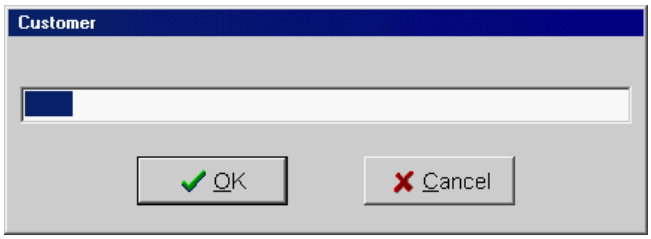


4 Click on the **Close** button to terminate the viewing.

6.4.10.16 Viewing authorized users who can approve disposal lists

The report produced here includes all the users that were authorized, at the record center, to sign disposal lists (settings of the *Authorized User* module).

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **View**->**Authorized Users**. A window appears.



3 Enter the code of the customer in question and press **OK**. The report is automatically produced.

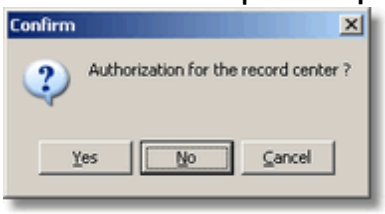
Note : When the customer is billed by department (settings of the *Customer Information* module), the report is divided and displayed consequently.

6.4.10.17 Viewing or printing items to be disposed of

Which lists are available and what can be done with them depends on the state of the list.

The list is in the CREATED state

1. Click the Inventory->Disposal List module from the Main Window.
2. Navigate to the desired disposal list
3. Click **File->View | Print Report->For customer**. A dialog box appears



4. Click **Yes** if this is the listing that will be sent to the customer for authorization. In this case, the report will include spaces for the customer to approve each box or enter an new date, and a space at the bottom for the customer to provide a signature authorizing the disposal list.

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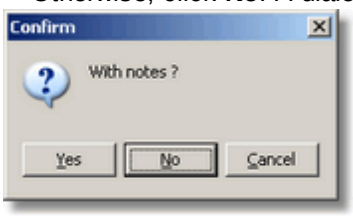
Otherwise, click **No**. A dialog box appears.



5. Click **Yes** to include box and file notes of upto 500 characters for items that have them. Otherwise, click **No**.
6. A report will appear or be printed. If the list was printed for authorization, the list will go to the **Locked** state, preventing differences between the list that the customer approves and the list that is in the system.

6.4.10.18 Viewing or printing the items on a pallet

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**View|Print Report -> Pallet.**
3 The list of pallets that have not been destroyed appears. Select one or many pallets (they will appear highlighted) and press **OK**.
4 The report(s) are automatically printed or shown.

6.4.10.19 Deleting images and documents related to a pallet

When a pallet is verified for destruction 408, images in the destroyed files are automatically deleted. If there was a problem and a pallet was destroyed without the associated images and documents being deleted, a list will appear in the daily tasks 580 report. It is possible to delete them as follows:

1. From the **Inventory->Disposal list** module, select **File->Processing->Delete images/ documents related to pallet**.
2. Scan or enter the pallet bar code.

EDC will repeat the deletion of the images. (If difficulties persist, please contact support@docudatasoft.com.)

6.4.10.20 Viewing or printing the pallets included in a list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Search for the wanted disposal list and keep it on the screen.
3 Click on **File**->**View|Print Report -> Pallets for list.**
4 The report is automatically printed or shown.

6.4.10.21 Viewing or printing volume of boxes to be disposed of

The report produced here can be shown to the customer, in order to give him the exact volume of boxes to dispose of and to evaluate the costs.

This report only includes the volume of boxes. For files, the report will be empty, since a file does not have a storage volume assigned. It will be the responsibility of the record center to manually bill the disposal of the files.

1 Click on **Inventory**->**Disposal List** from the *Main window*.

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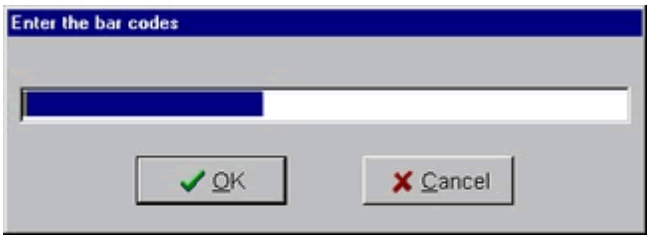
2 Find the desired list and keep it on the screen.
3 Click on **File->View| Print Report->Volume.** The report is automatically printed or displayed.

Note : For customers which are billed by department, the report will be divided consequently. The report is also divided by document types when departments are associated to document types (settings in the *Customer Information* 223 and *Retention Schedule* 286 modules).

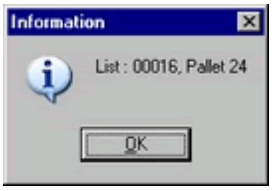
6.4.10.22 Finding a disposal list

This is normally used when one wants to find on which destruction list a box is on. It can be used if a box is misplaced on another pallet by an employee; this feature facilitates the correction of mistakes.

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**Find destruction list.** A window appears.



3 Enter the box's barcode manually or with the keyboard-wedge scanner. Press **OK**.
4 An information window appears, giving the list number and the pallet number on which the box is supposed to be.



6.4.10.23 Editing or deleting a CREATED disposal list

Editing a list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 The status of the list must be CREATED
4 Perform one of the following operations (details in the "Manually creating a disposal list 402" section).

- Add items by clicking on **Edit**->**Add Boxes**. In order to be added the documents must be IN.
- Add items from a list by on **Edit**->**Add from list**. A window appears

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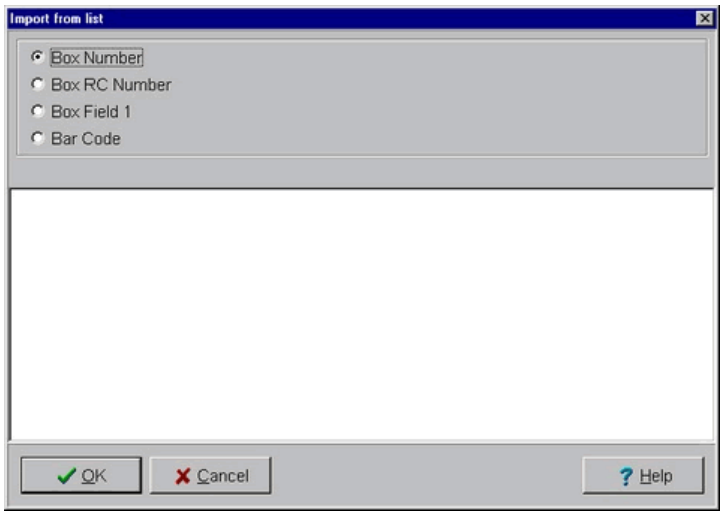
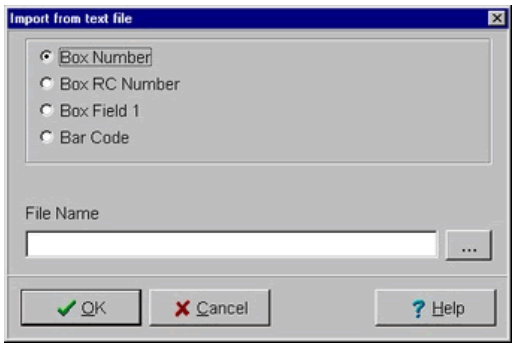


Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. *Example:* if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit**->**Add from text file**. A window appears



According to the document type that is added, check off the related options. *Example:* if you want to add boxes by box number, check the *Box number* option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

Note : The files that allow to add boxes that way must be text files and can only contain numbers displayed in columns.

- Delete items by clicking on **Edit**->**Remove Items**.
- Delete items and change the date of the list by clicking on **Edit**->**Remove items,Change Date**
- Add, edit or delete a note from the list by clicking on **Edit**->**Notes**. Edit the list's description by clicking on **Edit**->**Edit** and by entering a new description in the appropriate field.

*Deleting a list

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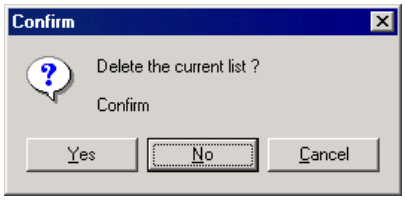
1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 The status of the list must be CREATED, LOCKED or AUTHORIZED.
4 Click on **File**->**Delete List**. A dialog box appears.



5 Click on the **Yes** button to confirm the deletion.

6.4.10.24 Removing items from an AUTHORIZED or LOCKED disposal list

1. Open the **Inventory->Disposal List** module.
2. Navigate to the desired list.
3. If the status of the list is *AUTHORIZED* or *LOCKED*, you will have the option to select **Edit -> Remove Authorized Items**.
4. A window appears. Enter a password and press **OK**.
5. Enter the number of the item you want to remove and press **OK**.
6. A list of the items on the transfer list appears; highlight the items you want to remove and press **OK**.
7. The selected items will not longer be on the disposal list.

6.4.11 Transfer List

6.4.11.1 Overview (Transfer List)

The *Transfer List* module enables record centers to systematically transfer lists of boxes permanently out of the record center, at the request of a customer. See the procedures section 150 for links to the steps in the process.

Available reports
- picking list of documents to be transferred
- list of documents to be transferred
- authorization list for documents to be transferred
- volume of boxes to be transferred

Fields 417 (see the next section)

Tasks
- Using the PDT when transferring documents 423
- Viewing or printing documents to be transferred 424
- Viewing or printing the items on a pallet 424
- Viewing or printing the pallets included on a list 425

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- Editing or deleting a CREATED transfer list 426

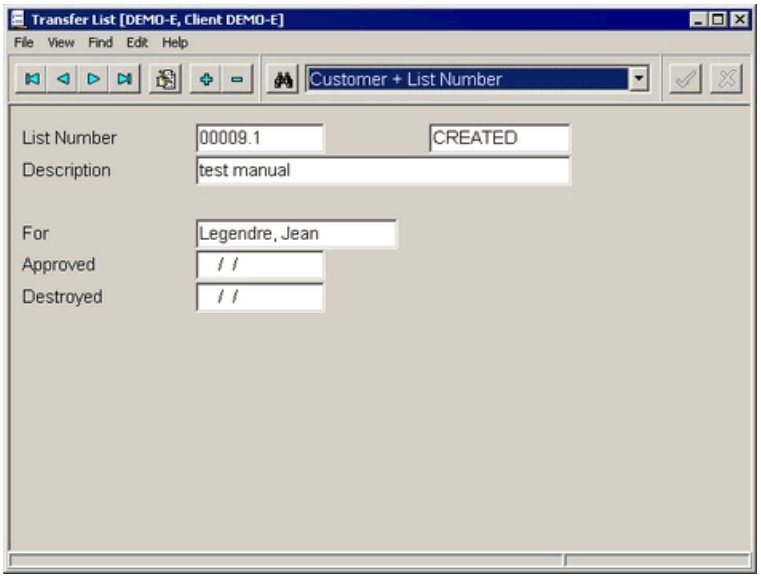
Distinctive menu options:

File menu
- Create list (Manually creating a list of documents to transfer) 417
- Auto-create (Auto-creating a list of documents to transfer 419)
- Authorize (Authorizing a transfer list 422)
- Create by-pallet lists (Creating By-Pallet transfer lists) 420
- Processing
  - Sending the Pallet picking list to the PDT 421
  - Receiving the Pallet picking list from the PDT 421
  - Receiving the Pallet Verification list from the PDT 421
  - Resetting a Pallet 421
  - Reprinting Pallet labels 422
- Find transfer list 425

View menu
- Items (Viewing the items on a transfer list) 425
- Notes (Viewing notes on a transfer list 410)

Edit menu
- Add boxes 417
- Add from list 417
- Add from text file 417
- Notes 423
- Remove items 426
- Remove authorized items (Removing items from an AUTHORIZED or LOCKED transfer list 427)

Module window:



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6.4.11.2 Fields (Transfer List)

List Number
Number generated by the system to identify the list. A number with a decimal indicates that the list has been reset so that changes could be made

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can still be edited for changes or deleted);
LOCKED : the list has been printed for authorization and sent to the customer. It cannot be edited or deleted, unless it is reset;
AUTHORIZED : the list has been returned to the record center, properly signed and authorized. It cannot be edited or deleted;
TRANSFERRED : the list has been processed and the concerned documents have been transferred to the site.

Description
Summary description of the current list.

For
Indicates the authorized user (the requester) for which the list has been created.

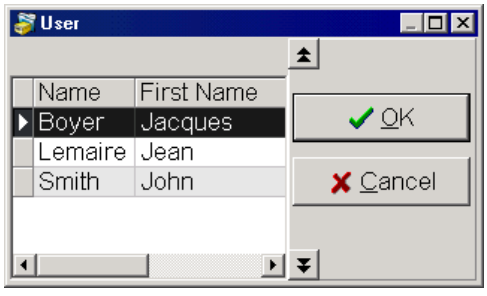
Approved
Indicates the date when the list has been authorized.

Processed
Indicates the date when the list has been processed.

6.4.11.3 Manually creating a list of documents to transfer

The major characteristic of a transfer list manually created is the addition of the items one by one. That way, any customer demand can be answered easily.

1. Click on **Inventory**->**Transfer List** from the *Main window*.
2. Click on **File**->**Create List**. A window appears and asks to enter a customer code.
3. Enter the code of the desired customer and press **OK**. A new window opens.



4. Select a user and press **OK**. The system generates a new list whose number follows the number of the last list created for that customer. The user selected here appears in the *For* field.
5. Enter a summary description for the list in the *Description* field and click on the **Accept** button.
6. Perform one of the following operations :

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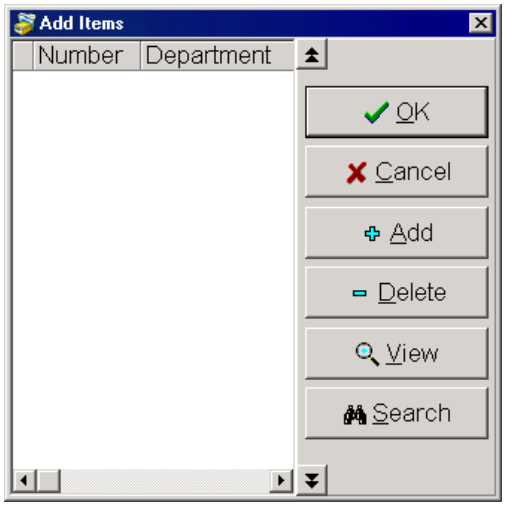
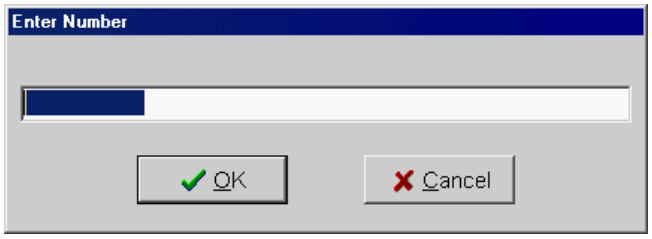
- To add items, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.



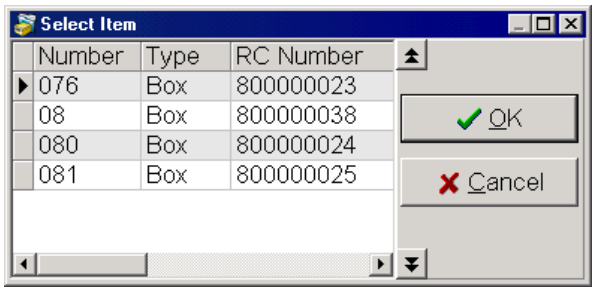
Click on the **Add** button. A window appears and asks to enter a box or file number. Enter the desired number and click on the **Accept** button. Proceed as many time as desired and press **OK** when finished.

Note : The state of every item added to the list becomes ON TRANSFER in the *Box* and *File* modules. In order to be added to the list, the initial state of these documents must be IN. If it is not, an error message will appear.

- To remove items, click on **Edit**->**Remove Items**. A window appears.



Enter a number to indicate where to start in the selection list and click on the **Accept** button. The list of items appears.



Select the desired items (they will appear highlighted) and press **OK**. The selected items are automatically removed from the transfer list and their state becomes IN.

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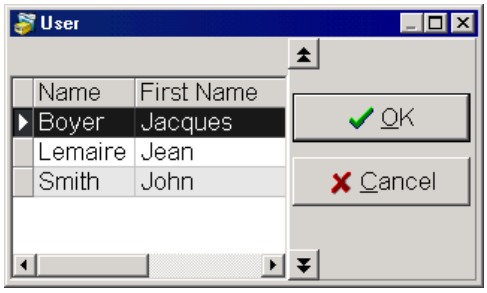
- To add or edit notes, click on **Edit**->**Notes**. A text window opens on the screen. Enter the desired notes or modify the existing notes and press **OK**.

7 The list is ready for verification and sending to the customer. It will be necessary to wait for the signed authorization from the customer to transfer the documents.

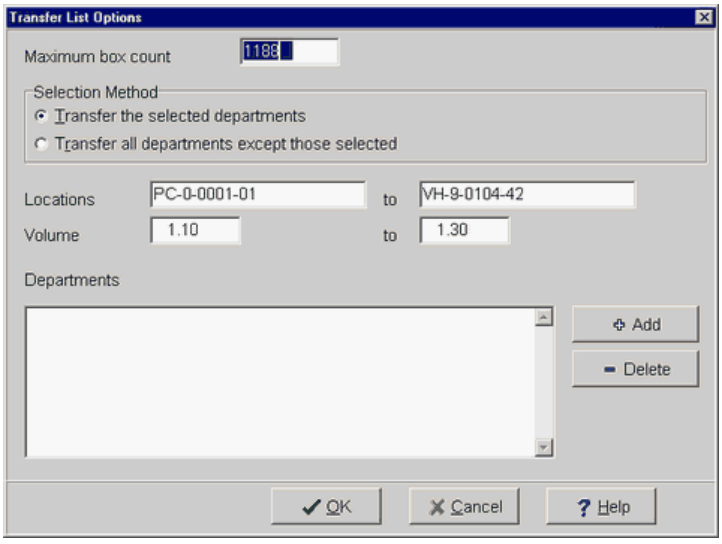
6.4.11.4 Auto-creating a list of documents to transfer

The auto-creation of a transfer list allows to batch add boxes that correspond to given criteria. This procedure can be useful when all the boxes of a department for one customer need to be transferred.

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Click on **File**->**Auto Create**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the customer in question and press **OK**. A window appears.



4 Select a user and press **OK**.
5 Enter a summary description in the *Description* field and click on the **Accept** button. A window opens.



Maximum box count : this field allows to enter a maximum quantity of boxes that can be added on the list. If the boxes that correspond to the next criteria is more important than that quantity, the system will stop to add items on the transfer list. Items may be added manually, such as

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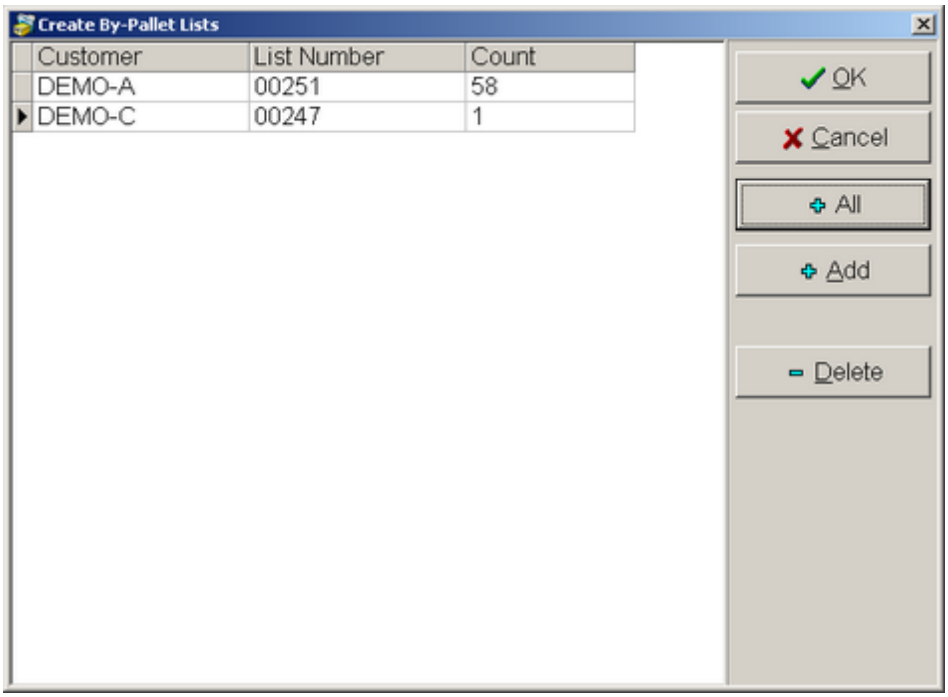
described in the previous section.
Selection Method : according to the checked option, this field allows to specify if the system must add all the documents that belong to the selected departments or if all the documents must be added, except for the ones that belong to these departments.
Locations : this field allows to enter a range of locations to take into account when adding items to the list.
Volume : this field allows to indicate a range of volume to take into account when adding boxes to the list.
Departments : by clicking on the **Add** and **Delete** buttons located to the right of the field, it is possible to establish a list of the departments to exclude or include to the transfer list. This field is related to the selection method set previously.

6 Enter the desired selection criteria in the appropriate fields and press **OK** to register the selection. The system automatically sorts and adds the items accordingly.

The list is ready to be verified, printed and sent to the customer for authorization. Before being printed for authorization, items or notes can be manually added, edited or removed from the list, such as described in the step **6** of the previous section 417.

6.4.11.5 Creating By-Pallet Transfer Lists

1 Click on **Inventory -> Transfer List** from the *Main window*.
2 Click on **File -> Create By-Pallet Lists**. A window appears, displaying the authorized lists and the number of boxes on each.



3 Specify the lists that will be on the final processing list

- To delete a list, select a transfer list in the list (it will appear highlighted) and press the **Delete** button.

- To add a list press the **Add** button. Enter the customer key or press **OK** to have the list of customers (select a customer on the list, it will appear highlighted, and press **OK**). Press **OK**.

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Enter the list number and press **OK**.

- To add all the lists that are in the Authorized state, click on the **All** button.

4 When all the changes have been made, press **OK**. Pallet labels will automatically be printed on the default thermal printer.

6.4.11.6 Sending the Pallet Picking List to the PDT

1 Click on **Inventory -> Transfer List** from the *Main window*.
2 Click on **File ->Send Pallet picking list to PDT**
3 An information message appears asking to prepare the PDT.
4 Prepare the PDT to receive information by pressing **1-Receive.**

6.4.11.7 Receiving the Pallet Picking List from the PDT

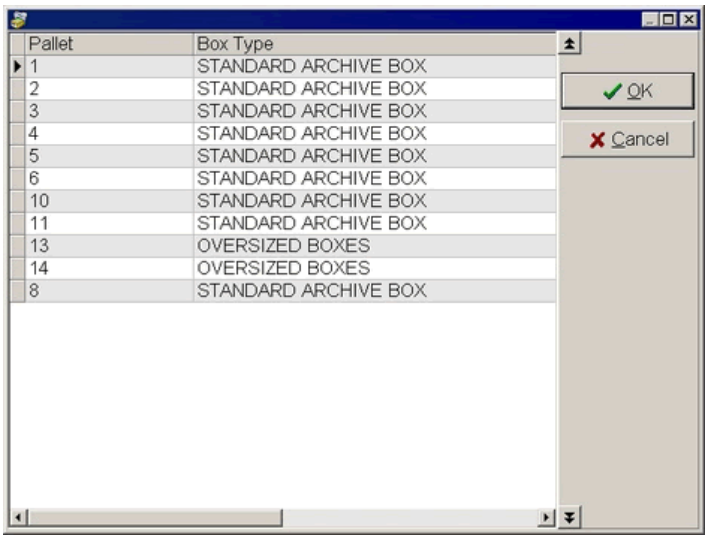
1 Click on **Inventory -> Transfer list** from the *Main window*.
2 Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3 Click on **File ->Receive Pallet picking list from PDT**

6.4.11.8 Receiving the Pallet Verification list from the PDT

1 Click on **Inventory -> Transfer List** list from the *Main window*.
2 Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3 Click on **File ->Receive Pallet Verification list from PDT**
4 As soon as the results are uploaded, a report of errors will be displayed.
5 If all the items have been verified, the system will ask you if you want to print the delivery slip. Click on *Yes* to print it, and *No* or *Cancel* to abort the printing.

6.4.11.9 Resetting a Pallet

1 Click on **Inventory -> Transfer List** from the *Main window*.
2 Click on **File -> Reset Pallet**. A window appears with the list of all pallets that are not destroyed.



3 Select the pallet you want to reset (it will appear highlighted) and press **OK**.
4 The pallet picking list will be reset (the pallet will appear on the list when sending a pallet picking

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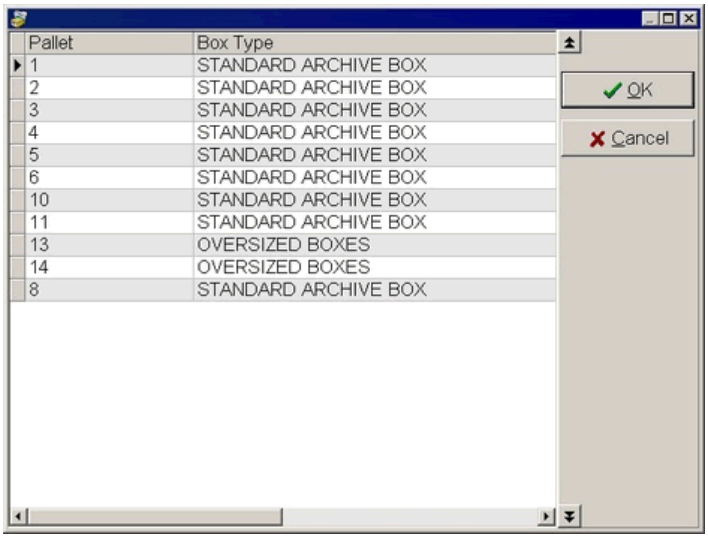
list to the PDT).

6.4.11.10 Reprinting pallet labels

1. Click on **Inventory -> Transfer List** from the *Main window*.
2. Click on **File -> Reprint Pallet Label**. A window appears with the list of all pallets that are not destroyed.



3. Select all the pallet labels you want to reprint (they will appear highlighted) and press **OK**.
4. The labels will be printed on the thermal printer.

6.4.11.11 Authorizing a transfer list

After having been created, a transfer list may be printed for authorization (see "Viewing the items on a transfer list 425") and sent to the customer. The customer will have to check the list, sign it and return it to the record center. The list is then ready to be processed.

Consequently, the processing of the list must respect the following steps in that order : the authorization of the list, the picking of the items, the verification of the picked items and the transfer of these items to another site.(See also the Permanently transferring items to another site 150 topic.)

For the subsequent operation, we will consider that a transfer list has been created and locked, and that the list is on the screen and is waiting to be processed.

*Authorizing the list

1. Click on **Inventory**->**Destruction List** from the *Main window*.
2. Find the desired list and keep it on the screen. Its status must be CREATED or LOCKED.
3. Click on **File**->**Authorize**. A dialog box appears.

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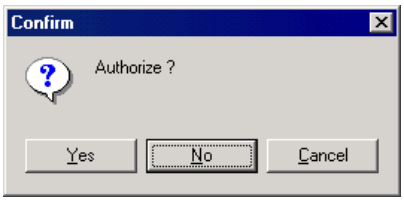
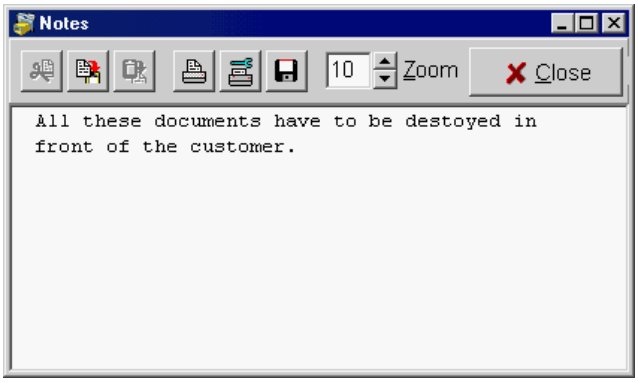


4 Click on the **Yes** button to confirm the operation The status of the list becomes AUTHORIZED and the items can be picked.

6.4.11.12 Viewing or editing notes on a disposal list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Notes**. The report's window appears.



4 Click on the **Close** button to terminate the viewing.

6.4.11.13 Using the PDT when transferring documents

Picking items to put on a pallet

1. Send the pallet picking list to the PDT 421
2. On the PDT press **3-Processing -> 8-Pallet Pick**
3. Press the number of the list you want to pick
4. Scan the pallet label
5. Pick and scan the items that appear on the screen
6. When all the items have been picked, the PDT goes back to the main menu
7. Send the pallet picking list back to the software 421

Verifying items on a pallet

1 On the PDT press **3-Processing -> 9-Pallet Verif**.
2 Scan the pallet label
3 Scan all the items on the pallet

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4 When all items are scanned, scan the pallet label to close the list.
5 Send the pallet verification list back to the software 421

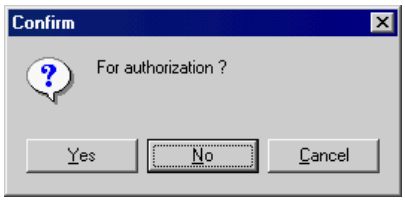
6.4.11.14 Viewing or printing documents to be transferred

The list is CREATED

When a transfer list is being created, only the report for the customer (for authorization or not) can be printed or displayed.

Note : When displaying the report the list is not modified, even if it is for authorization. But when printing the report, the status of the list becomes LOCKED.

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **File**->**View Report|Print Report**->**For customer**. A dialog box appears.



4 Click on the **Yes** button or on the **No** button, according to the report that must be produced. The system automatically displays the report's window or prints the list from the default printer. As soon as the report is printed, the list will be changed to the LOCKED state.

Note : When producing a report for authorization, it will contain boxes to check off and spaces where to sign, since the transfer lists have to be approved by the customer.

The list is LOCKED

When a transfer list is locked, it is possible to produce a report for the customer.

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **File**->**View Report|Print Report**->**For customer**
4 When producing the report for a customer, proceed such as describe above.

Note : For customers which are billed by department, the report will be divided consequently. The report is also divided by document types when departments are associated to document types (settings in the *Customer Information* 223 and *Retention Schedule* 286 modules).

6.4.11.15 Viewing or printing the items on a pallet

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Click on **File**->**View|Print Report -> Pallet.**
3 The list of pallets that have not been destroyed appears. Select one or many pallets (they will appear highlighted) and press **OK**.
4 The report(s) are automatically printed or shown.

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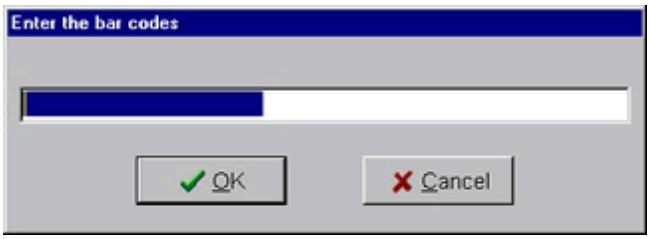
6.4.11.16 Viewing or printing the pallets included on a list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Search for the wanted disposal list and keep it on the screen.
3 Click on **File**->**View|Print Report -> Pallets for list.**
4 The report is automatically printed or shown.

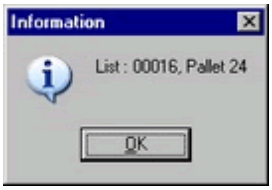
6.4.11.17 Finding a transfer list

This is normally used when one wants to find on which transfer list a box is on. It can be used if a box is misplaced on another pallet by an employee; this feature facilitates the correction of mistakes.

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Click on **File**->**Find transfer list.** A window appears.

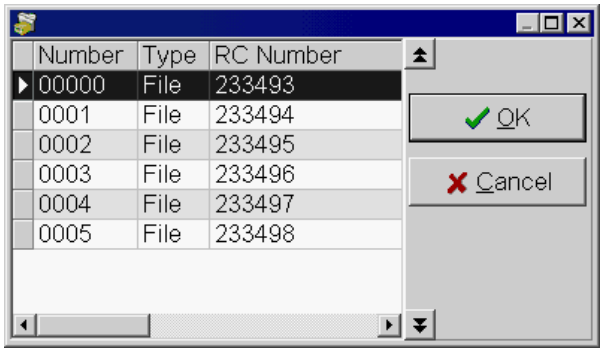


3 Enter the box's barcode manually or with the keyboard-wedge scanner. Press **OK**.
4 An information window appears, giving the list number and the pallet number on which the box is supposed to be.



6.4.11.18 Viewing the items on a transfer list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Items**. The report's window appears.



4 Press **OK** to end the viewing.

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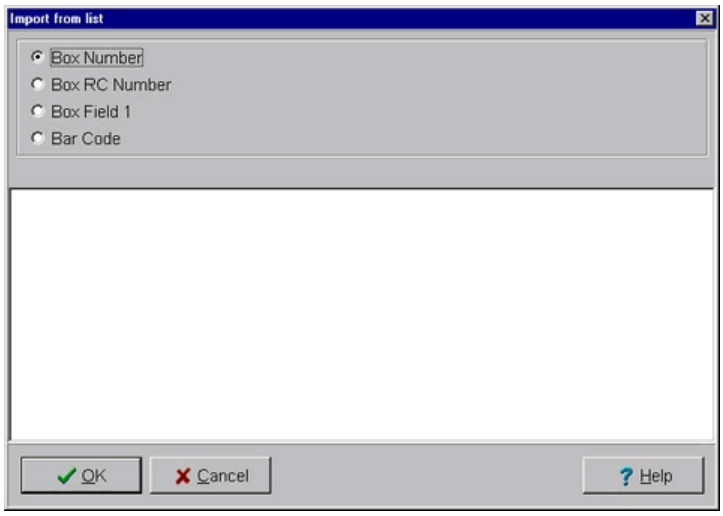
6.4.11.19 Editing or deleting a CREATED transfer list

Editing a list

1. Click on **Inventory**->**Transfer List** from the *Main window*.
2. Find the desired list and keep it on the screen.
3. The status of the list must be CREATED
4. Perform one of the following operations (details in the "Manually creating a list of documents to transfer 417" section).

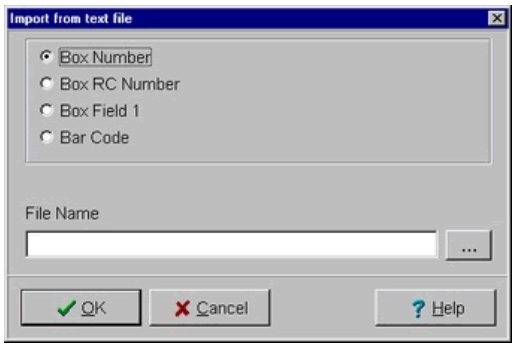
- Add items by clicking on **Edit**->**Add Boxes**. In order to be added the documents must be IN.
- Add items from a list by on **Edit**->**Add from list**. A window appears



Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. *Example:* if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit**->**Add from text file**. A window appears



According to the document type that is added, check off the related options. *Example:* if you want to add boxes by box number, check the *Box number* option.

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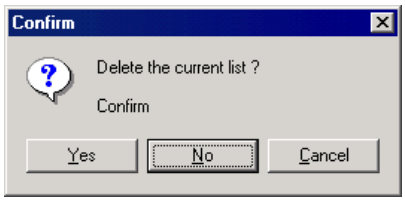
Enter a text file name or scroll the directories to find the right text file and press **OK**.

Note : The files that allow to add boxes that way must be text files and can only contain numbers displayed in columns.

- Delete items by clicking on **Edit**->**Remove Items**.
- Add, edit or delete a note from the list by clicking on **Edit**->**Notes**. Edit the list's description by clicking on **Edit**->**Edit** and by entering a new description in the appropriate field.

Deleting a list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 The status of the list must be CREATED, LOCKED or AUTHORIZED.
4 Click on **File**->**Delete List**. A dialog box appears.



5 Click on the **Yes** button to confirm the deletion.

6.4.11.20 Removing items from an AUTHORIZED or LOCKED transfer list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 The status of the list must be AUTHORIZED or LOCKED.
4 Click on **Edit -> Remove Authorized Items**. A window appears.
5 Enter a password and press **OK**.
6 Enter the number of the item you want to remove and press **OK**.
7 A list of the items on the transfer list appears, select the items you want to remove (they will appear highlighted) and press **OK**.
8 The items previously selected will be removed from the list.

6.4.12 Deletion List

6.4.12.1 Overview (Deletion List)

If items that are *OUT* to a customer will not be returned to the record center, they can be marked as *DELETED* from inventory using this module. This cancels future storage charges, but does not erase the information from the database. It is possible to return *DELETED* items to inventory, at which time storage for boxes would be reinstated.

Customers with sufficient web licenses and user rights may also create and process deletion lists using ActiveWeb.

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Available reports
- List of documents to be deleted 433
- Volume of boxes to be deleted 434
- (See the *Report* 364 module for additional reports)

Fields 429 **(see the next section)**

Tasks
- Creating a deletion list 429
- Editing or deleting a deletion list 432
- Deleting documents from inventory 432
- Viewing the items on a deletion list 433
- Viewing notes on a deletion list 433
- Viewing or printing documents to be removed from the inventory 433
- Viewing or printing volume of boxes to be removed from the inventory 434

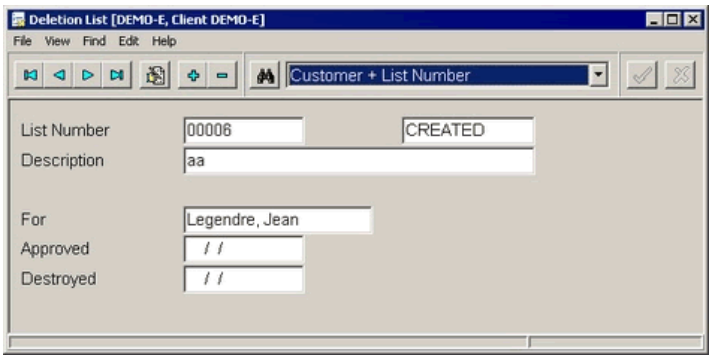
Distinctive menu options:

File menu
- Create list 429
- Delete list 432
- Processing -> (Authorize | Destroy list) 432
- View | Print volume 434

View menu
- Items 433
- Notes 433

Edit menu
- Add boxes 429
- Add files 429
- Add from list 429
- Add from text file 429
- Notes 429
- Remove items 432
- Remove authorized items 432

Module window:



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6.4.12.2 Fields (Deletion List)

List Number
Number generated by the system to identify this list. A number with a decimal indicates that this list has been reset so that changes could be made.

State
Indicates where the list is in the treatment process.

CREATED : the list is being created (it can be edited or deleted).
LOCKED : the list has been printed for verification (it cannot be deleted or modified without being reset).
AUTHORIZED : the customer has provided signed authorization for removing these items from inventory.
DELETED : the list has been processed and the related storage fees have been canceled.

Description
Summary description of the current list.

For
Indicates the authorized user for which the list has been created.

Authorized
Indicates the date when authorization was entered, and the employee who verified it.

Destroyed
The date when the list was processed and items were marked as deleted.

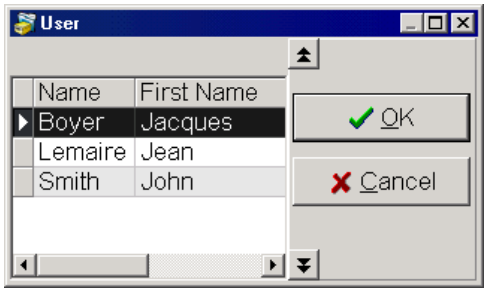
6.4.12.3 Creating a deletion list

The deletion process is similar to the disposal or the transfer process, except that the boxes are not at the record center. Documents are marked as DELETED but their information is retained in the database.

If a deleted document is returned to the record center later, the box will automatically be returned to the in state and storage charges for this item will resume.

Note that customers may also process their own deletion lists using ActiveWeb. (See ActiveWeb documentation for further details.)

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Click on **File**->**Create List**. A window appears and asks to enter the customer key.
3 Enter the code of the desired customer and press **OK**. A new window opens.



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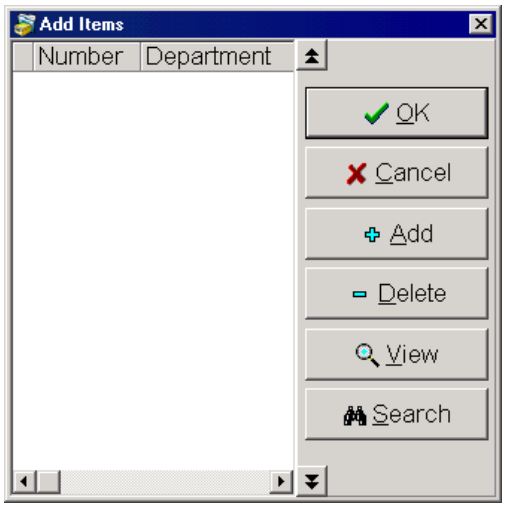
4 Select a user and press **OK**. The system generates a new list whose number follows the number of the last created list for this customer. The user selected here will appear in the *For* field.
5 Enter a summary description for the list in the *Description* field and click on the **Accept** button.
6 Perform one of the following operations :

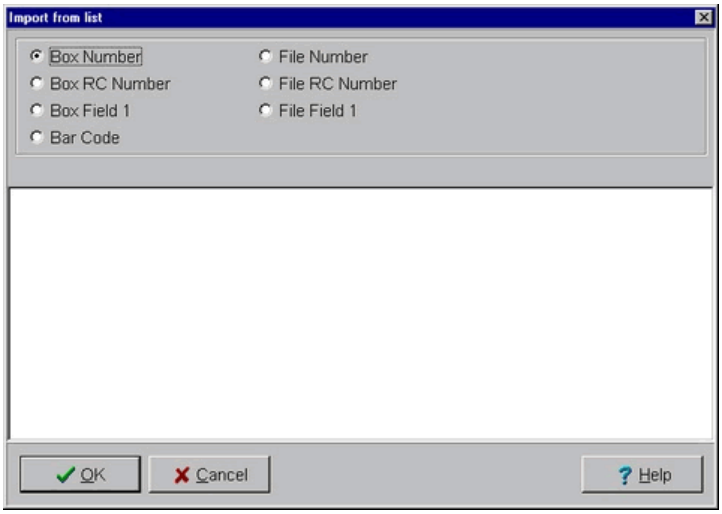
- To add items, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.



Click on the **Add** button. A window appears and asks to enter a box or file number. Enter the desired number and click on the **Accept** button. Proceed as many time as desired and press **OK** when finished.

Note : The state of every item added to the list becomes ON DELETION in the *Box* and *File* modules. In order to be added to the list, the initial state of these documents must be OUT. If not, an error message will appear.

- To add items from a list, click on **Edit**->**Add from list**. A window appears.



Check off the related option and write the corresponding information in the empty field at the

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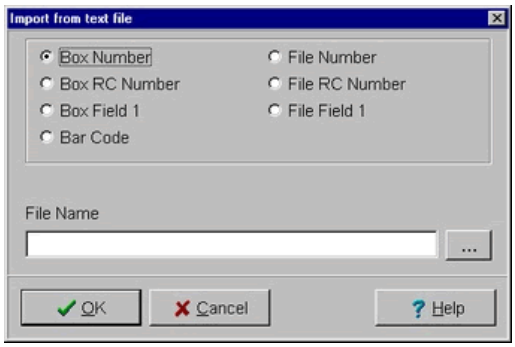
bottom and press **OK**. *Example*: if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

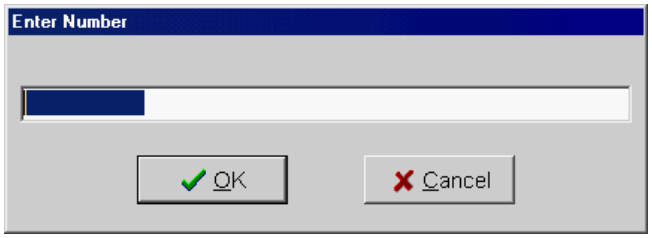
- To add items from a text file, click on **Edit**->**Add from text file**. A window appears.



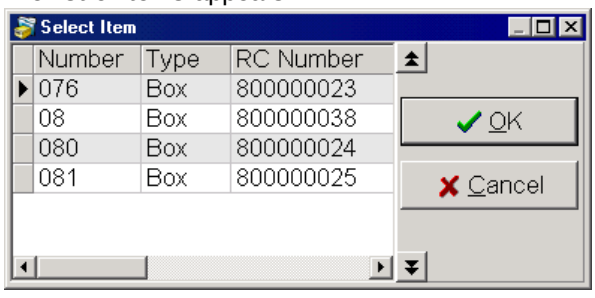
According to the document type that is added, check off the related options. *Example*: if you want to add boxes by box number, check the *Box number* option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

- To remove items, click on **Edit**->**Remove Items**. A window appears.



Enter a number to indicate where to start in the selection list and click on the **Accept** button. The list of items appears.



Select the desired items (they will appear highlighted) and press **OK**. The selected items are automatically removed from the deletion list and their state becomes OUT.

- To add or edit notes, click on **Edit**->**Notes**. A text window opens on the screen.
  Enter the desired notes or modify the existing notes and press **OK**.

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7 The list can then be printed for verification by clicking on **File**->**Print Report**->**For a customer**. Its status will become LOCKED.

6.4.12.4 Editing or deleting a deletion list

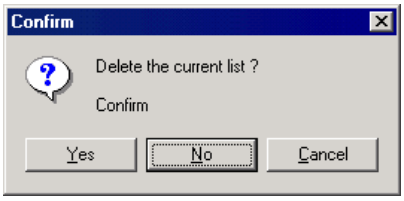
In order to be edited or deleted, the status of a deletion list must be CREATED or AUTHORIZED.

1. Open the **Inventory->Deletion List** module.
2. Navigate to the desired list.

To edit a list in the *CREATED* **state:**
- Select the operation from the Edit menu, as described in the previous 429 section.

To edit a list in the *LOCKED* **or** *AUTHORIZED* **state:**
- To remove items select **Edit->Remove Authorized Items** then enter your password.
- Select the items to be removed and click **OK**.
- To edit notes select **Edit->Notes**
- For more extensive edits of an AUTHORIZED list, delete it and create a new one.

To delete a list:
- Click on **File->Delete List**. A dialog box appears.

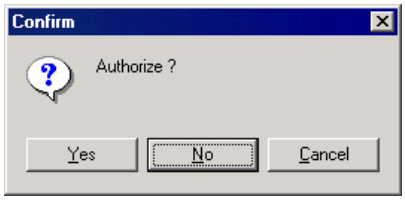


- Click on the **Yes** button to confirm the deletion.

6.4.12.5 Deleting documents from inventory

Deletions lists submitted by authorized users online are automatically verified and deleted. Lists created at the record center should be reviewed and authorized prior to deletion.

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Create a deletion list (see "Creating a deletion list 429") and print the list of documents for verification by clicking on **File**->**Print Report**->**For a customer**. The status of the list may then be LOCKED.
3 Click on **File**->**Processing**->**Authorize**. A dialog box appears.



Note : The authorization notion refers here to an internal approval. In fact, it means that the list has been verified, but it does not mean that a signed authorization has been sent by the customer.

4 Click on the **Yes** button. The status of the list becomes AUTHORIZED and the items can be processed.

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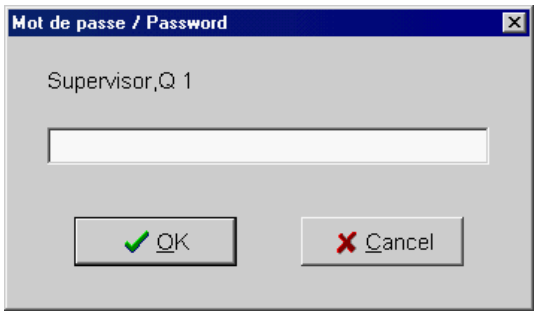
5 Click on the **File**->**Processing**->**Destroy List**. A window appears.



Note : This window indicates the name of the user logged in.

6 Enter a password and press **OK**. The system automatically deletes the list and its status changes to DELETED. The state of documents also changes to DELETED. A delivery is automatically produced by the system, indicating the volume in storage that is cancelled and must not be charged anymore. This delivery is viewable in the *Delivery Verification* module.

Note : When a deletion list only includes files, no delivery is created, since no storage location is emptied. A message is displayed consequently.

6.4.12.6 Viewing the items on a deletion list

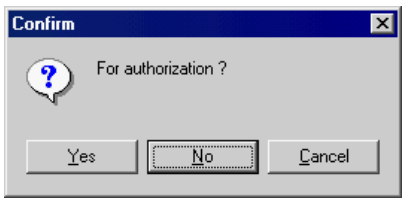
1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Items**. A window containing all the items on the list will automatically be displayed.

6.4.12.7 Viewing notes on a deletion list

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Notes**. The notes will be automatically displayed. If the list contains no notes, an information message will appear.

6.4.12.8 Viewing or printing documents to be removed from the inventory

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Find the desired list and keep it on the screen.
3 Click on **File**->**View Report**|**Print Report**->**For customer**. A dialog box appears when the list is created.



4 Click on the **Yes** button if the report must be produced for authorization. The system automatically displays the report's window or prints the list from the default printer.

Note : Whether you are producing a report for authorization or not, both will have the same display.

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None of them will contain boxes to check off or spaces for signatures, since the deletion lists do not have to be approved by the customer. The only difference is that when printing an authorization report, the status of the deletion list becomes LOCKED and it allows to go on the next step of the process.

6.4.12.9 Viewing or printing volume of boxes to be removed from the inventory

This report can help customers to evaluate the savings made when deleting documents, since the related storage fees will not be charged anymore.

1. Open the **Inventory->Deletion List** module.
2. Navigate to the desired list.
3. Select **File->View Volume|Print Volume**. The report is printed or displayed.

Note : This report takes into account boxes but ignores files.
For customers that are billed by department, the report will be divided accordingly.

6.4.13 Internal Transfer List

6.4.13.1 Overview (Internal Transfer List)

This module is used in systematically moving many boxes within the record center to others areas or buildings of the same record center.

Available reports

- For picking (Items to be picked)
- For refile (Items that have been picked and are awaiting refile)
- Successful moves (Includes rejection reason if unsuccessful)

Fields[435] **(see the next section)**

Tasks

- Manually creating a list of documents to transfer in-house[436]
- Auto-creating a list of documents to transfer in-house[438]
- Transferring documents from a location to another[439]
- Moving without verification[441]

Distinctive menu options:

File menu
- Create list[439]
- Auto Create[436]
- Processing[439]
- Close list[439]
- Delete list
- Move without verification[441]
- Upload move list[439]

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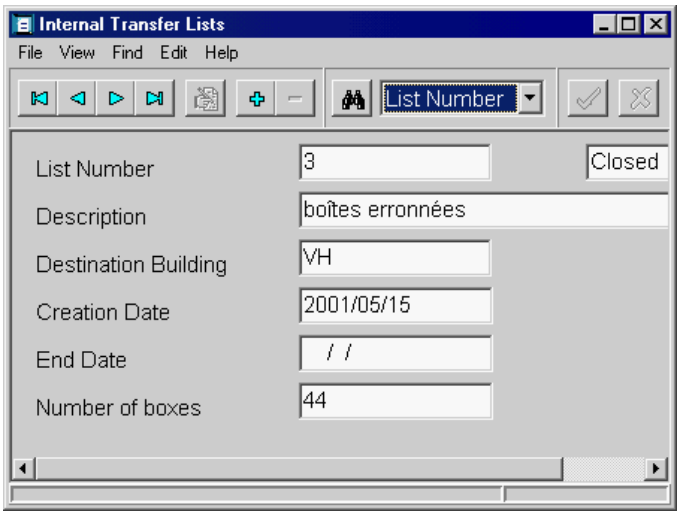
View menu
- Items (displays boxes on list)

Edit menu
- Edit 436
- Add items 436
- Add from list 436
- Add from text file 436
- Remove items 436

Module window



6.4.13.2 Fields (Internal Transfer List)

List Number
Number attributed to the list by the system and that identifies the list.

Status
Indicates at which step of the process the list is at.

CREATED : the list is being created. It can be edited for modifications or deleted;
IN TRANSIT : the items on the list have been picked and are waiting to be refiled in another location. The list cannot be deleted or modified;
CLOSED : the items on the list have been moved and verified; the transfer process is considered as complete.

Description
Summary description of the current list.

Destination Building
This field indicates the destination building of the items. This building is chosen when the list is created.

Creation Date
Indicates when the list was entered in the system.

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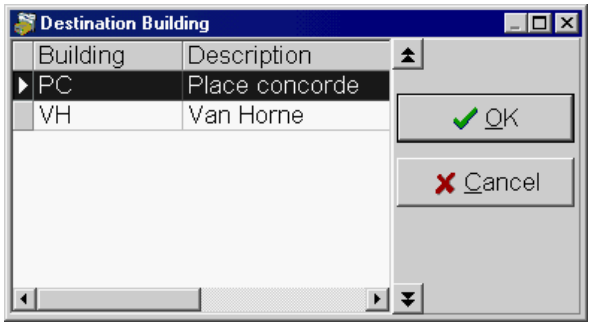
End Date
Indicates when the list was closed. The closing corresponds to the final treatment of the items included on the list.

Number of boxes
Indicates how many boxes are included on the list.

6.4.13.3 Manually creating a list of documents to transfer in-house

The major advantage of this operation is that boxes from different customers can be transferred in one operation.

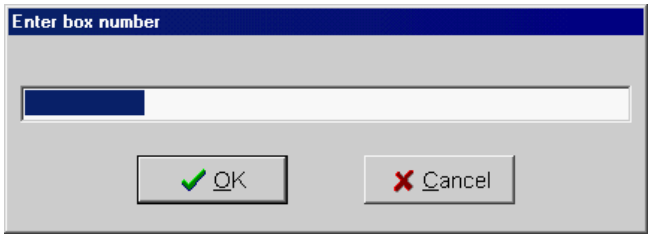
1 Click on **Inventory**->**Internal Transfer List** from the *Main window*.
2 Click on **File**->**Create List**. A window appears.



Note : Boxes can either be transferred to a new location within the same building or to another building of the record center.

3 Select a building and press **OK**. The system automatically generates a new list whose number follows the number of the last list created. The code of the building previously selected appears in the *Destination Building* field.
4 Enter a summary description for the list in the *Description* field and click on the **Accept** button.
5 Items can now be added or removed from the list :

- To add items, click on **Edit**->**Add Items**. A window appears and asks to choose one of the transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a customer code.Enter the code of the customer in question and press **OK**. A third window appears.



Enter a box number and press **OK**. Proceed as many times as desired and click on the **Cancel** button to end the addition of boxes for this customer. In order to add boxes for other customers, repeat the operation by choosing another customer in the first window.

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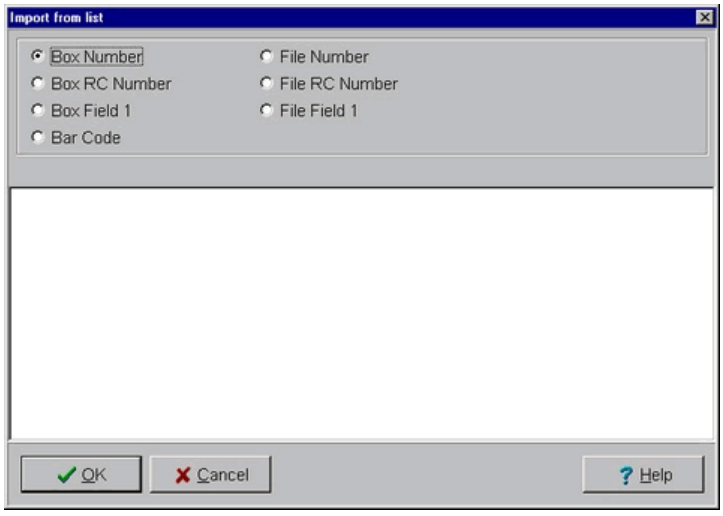
Note : Only IN documents can be added on an internal transfer list. Their state does not change, but their history and location are modified. In the *Boxes* module, the *Location* field will indicate the transit location of the building previously selected. Furthermore, new information appears in the history, to indicate that the item is on an internal transfer list and to keep track of its original location.

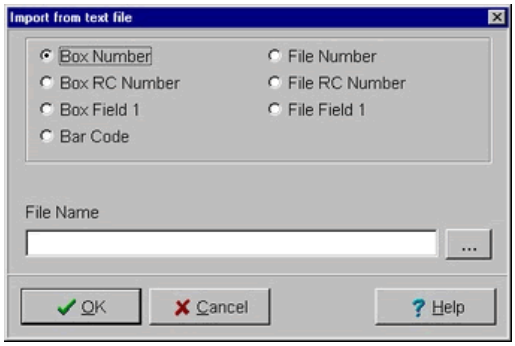
- To add items from a list, click on **Edit**->**Add from list**. A window appears and asks to choose one of the transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a customer code. Enter the code of the customer in question and press **OK**. A third window appears.



Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. *Example*: if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- To add items from a text file, click on **Edit**->**Add from text file**. A window appears and asks to choose one of the transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a customer code.Enter the code of the customer in question and press **OK**. A third window appears.



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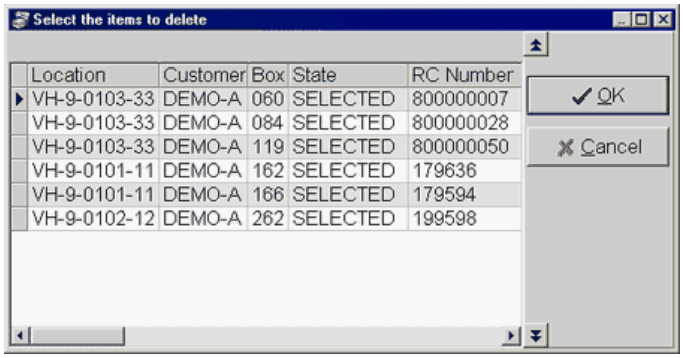
According to the document type that is added, check off the related options. *Example*: if you want to add boxes by box number, check the *Box number* option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

- To remove items, click on **Edit**->**Remove Items**. A window appears.

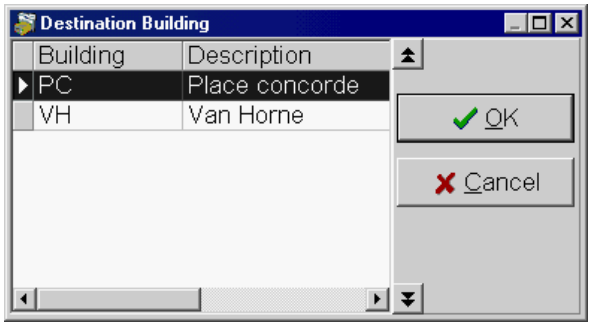


Select the desired items (they will appear highlighted) and press **OK**.

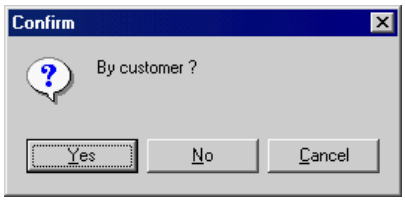
6.4.13.4 Auto-creating a list of documents to transfer in-house

The auto-creation allows to transfer many boxes for many customers in one operation, and also allows to batch add boxes that are stored in the same location range. This procedure is faster than the manual creation and can be very useful when an entire section of a building has to be transferred.

1 Click on **Inventory**->**Internal Transfer List** from the *Main window*.
2 Click on **File**->**Auto Create**. A window appears.



3 Select a building and press **OK**. A dialog box appears.



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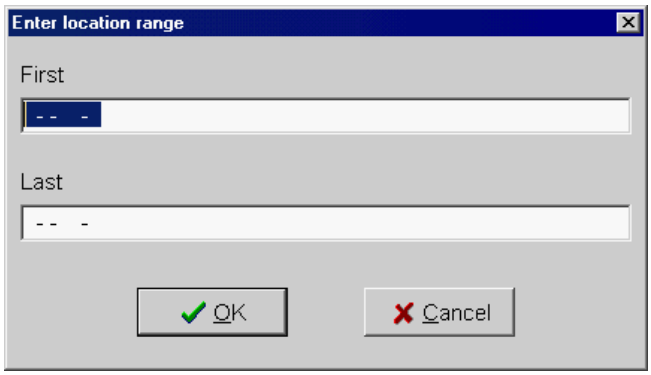
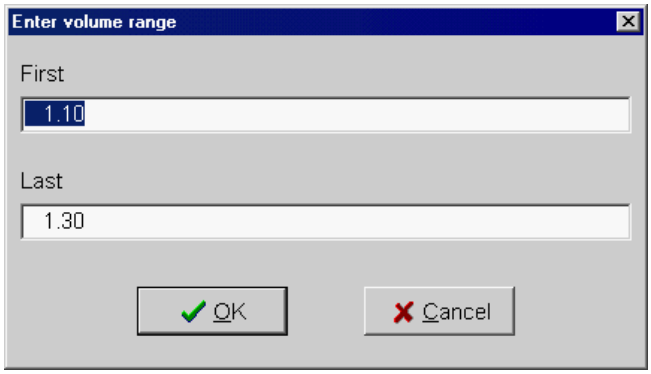
4 Click on the **Yes** button or on the **No** button, respectively to create a list for one customer and a range of locations or for all the boxes stored in a range of locations, no matter what customer they belong to.

5 According to the option previously selected, different windows appear.

- When the list is created for one customer a window appears and asks to enter a customer code. Enter the code of the desired customer and press **OK**. A new window opens.



Enter a range of locations to be transferred and press **OK**. Another window is displayed.



Enter a range of volume and press **OK**. All the boxes that respect the different search criteria are added to the list.

Note : The quantity of boxes added to the list is indicated in the *Number of boxes* field. Furthermore, the *Description* field will indicate "Auto-Created".

- When the list is created for all the customers, the system directly displays the window for the range of locations. Choose a range of locations and a range of volumes (see the steps described above).

6 It is possible to manually add boxes on the list by clicking on **Edit**->**Add Items** or to remove boxes by clicking on **Edit**->**Remove Items** (see details in the previous section 436).

6.4.13.5 Transferring documents from a location to another

Once an internal transfer list has been created manually 436 or automatically 438, the boxes are then picked, verified, and refiled.

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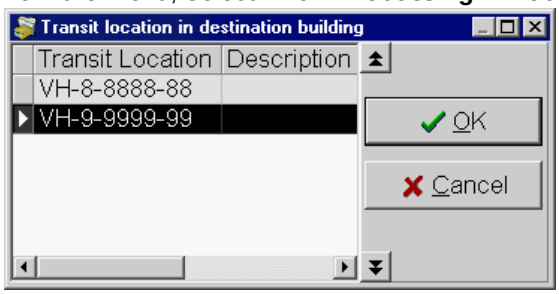
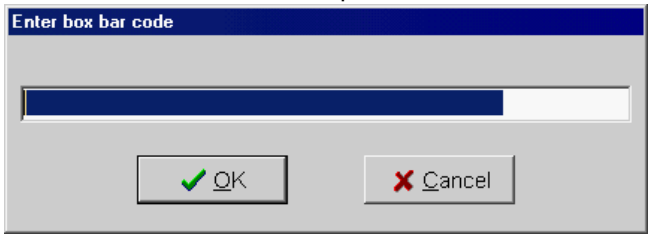
Pick and verify the boxes:

1. From the **Inventory->Internal transfer list** module opened to the correct list, click on **File->View|Print report->For picking**. This report includes the location of the boxes.
2. Retrieve the boxes to a transit location accessible with a barcode scanner.
3. From the menu, select **File->Processing->Process Items**. A window appears.



Note : When boxes are transferred from a building to another one, this window allows to choose the location of the destination building where they will be in transit before being refiled in their new location.

4. Choose a transit location and press OK. Another window opens.



5. Scan each box, then click on the **Cancel** button when done. The list becomes "In Transit". The boxes stay IN, but information is added in the history and indicates that the boxes have been transferred to the transit location of the destination building.

6. From the menu, select **File->Processing->View | Print non-processed items**. The report should be empty. If not, retrieve and scan the missing boxes.

Note: To force all items to the processed state without the above verification, select **File->Processing->Mark all items processed**. This is not generally recommended.

Move the boxes

7. Move the boxes with the PDT 108, uploading the move list to **File->Upload Move List**. A message appears.

8. If any items were not processed, click on **File->Process->View | Print non-processed items**, and repeat the previous step with the missing items. The process errors report 582 may be useful. (Orders->Delivery Maintenance, File->View reports->Process errors.) (see Reconciling process errors 576).

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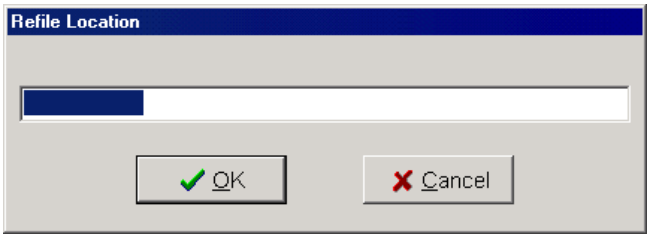
9. If desired, print a report of the successful moves by selecting **File->View | Print report->Successful Moves**.
10. When all transfers have been completed, click on **File->Close List**. The list becomes "*Closed*".

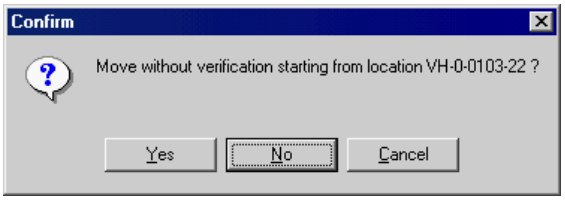
6.4.13.6 Moving without verification

This operation processes an internal transfer list without any verification by scanning. Be extremely cautious when using this. The method in the previous section 439 is preferable if boxes are actually being moved.

1. Open the **Inventory->Internal Transfer List** module.
2. Navigate to the desired list then select **File->Move without verification**. A window appears.



3. Scan a location or enter it manually and press **OK**. Another window appears.



4. Click on the **Yes** button to confirm the operation. The location of the items in the system is updated to this new location.

6.4.14 Internal Note

6.4.14.1 Overview (Internal Note)

In contrast to the *notes* fields in the *Inventory->Box* and *Inventory->File* modules, notes entered in the *Internal Notes* module will not be seen by the customer.

Available reports

- None. (See the *Report* 364 module)

Tasks

- Adding internal notes to a box | File 442

Distinctive menu options:

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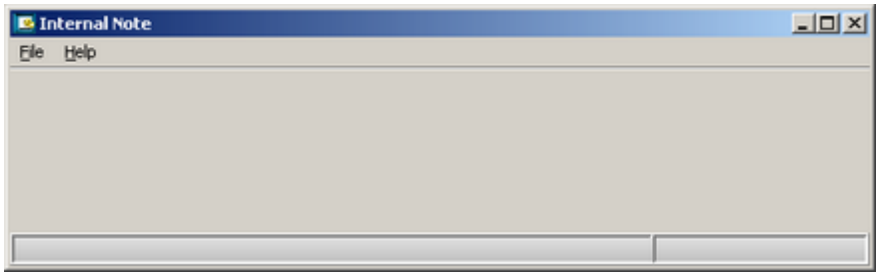
File menu

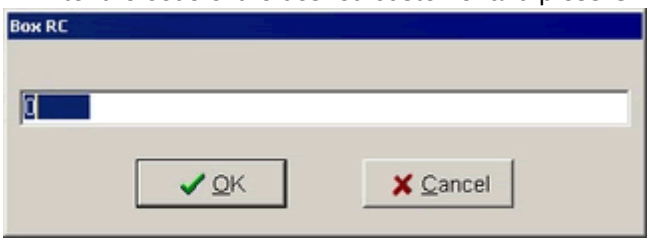
- Internal notes ->Box | File 442

Module window:

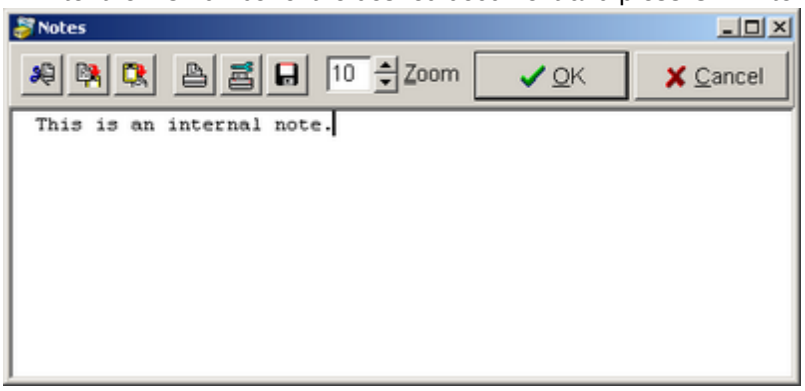


6.4.14.2 Adding or viewing internal notes

1. Open the **Inventory->Internal Note** module.
2. From the menu, select **File->Internal Notes->Boxes|Files**. A window appears.
3. Enter the code of the desired customer and press **OK**. A window appears



4. Enter the RC number of the desired document and press **OK**. A text window opens.



5. Edit or view the notes, then press **OK**.

6.4.15 Shredding Container

6.4.15.1 Overview (Shredding Container)

In addition to providing customers the service of destroying records 399 at the end of their retention period, many record centers also offer collection and destruction of sensitive paper waste that has not been stored at their facility.

The *Shredding Container* module is used to manage the inventory of various types of shredding containers and to link price codes to different shredding operations.

Containers provided by the record center are labeled with barcodes to permit the record center to track these operations for service and billing purposes.

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A *container emptying* service consists retrieving only the contents of a container that remains at the customer site, whereas a *container rotation* requires the record center to provide a new container (such as a console liner) and retrieve the existing one along with its contents.

See the procedures section for detailed steps on setting up and providing this service[139].

Available reports
- None. (See the *Report*[364] module)

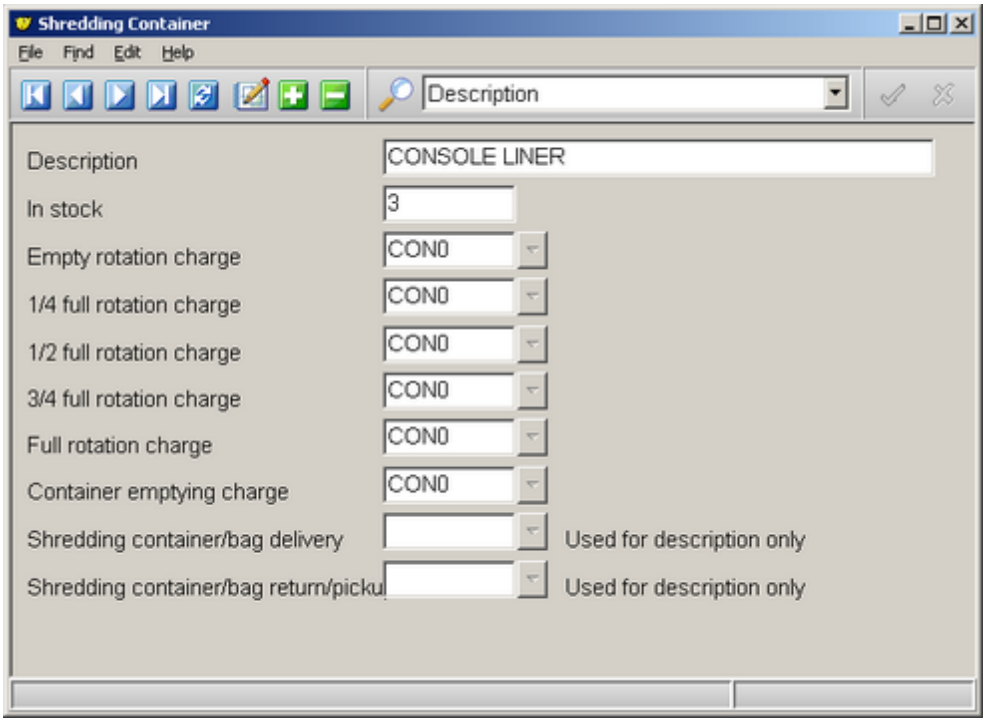
Fields[444] **(see the next section)**

Tasks
- Adding a shredding container[444]
- Editing a shredding container[445]
- Deleting a shredding container[445]
- Printing a shredding container label[445]

Distinctive menu options:

Edit menu
- Adjust customer quantity[445]

Module window:



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6.4.15.2 Fields (Shredding Container)

Description
Alphanumeric field containing a maximum of 40 characters.
This field contains the description of the container.

In stock
Numerical field containing a maximum of 10 characters.
This field contains the number of containers in stock.

Empty rotation charge
Price 632 code to be applied when the rotated container is identified as empty using the PDT 139 during rotation.

1/4 rotation charge
Price code 632 to be applied when the rotated container is identified as a quarter full using the PDT 139 during rotation.

1/2 rotation charge
Price code 632 to be applied when the rotated container is identified as half full using the PDT 139 during rotation.

3/4 rotation charge
Price code 632 to be applied when the rotated container is identified as three-quarters full using the PDT 139 during rotation.

Full rotation charge
Price code 632 to be applied when the rotated container is identified as full using the PDT 139 during rotation.

Container emptying charge
Price code 632 to be applied when the emptying this type of container.

Shredding container/bag delivery (Used for description only)
The description portion of this price code 632 is used to notify employees that they should pick and deliver a bag or container of this type to the customer.

Shredding container/bag return/pickup (Used for description only)
The description portion of this price code 632 is used to notify employees that they should retrieve a container of this type from the customer.

6.4.15.3 Adding a shredding container

1. Click on **Inventory->Shredding Container** from the *Main window*.
2. Click on **Edit -> Add** or press on the **Add** button. A window with empty fields is shown.
3. Enter the relevant information in the fields. For more information on the different fields, consult the Fields (Shredding Container) 444 topic. The description field as well as the price code fields are compulsory.
4. When all the information has been duly entered, press on the Accept button. A new type of shredding container is now available for your customers.

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6.4.15.4 Editing a shredding container

1. Click on **Inventory->Shredding Container** from the *Main window*.
2. Click on **Edit -> Edit** or press on the **Edit** button. The window appears in edit mode.
3. Modify the relevant information in the fields. For more information on the different fields, consult the Fields (Shredding Container) 444 topic.
4. Press the **Accept** button to confirm changes.

6.4.15.5 Deleting a shredding container

1. Click on **Inventory->Shredding Container** from the *Main window*.
2. Find the container you want to delete.
3. Click on **Edit ->Delete** or press on the **Delete** button.
4. Confirm the deletion by pressing **Yes**. To abort the operation press **No** or **Cancel**.

6.4.15.6 Printing a shredding container label

1. Click on **Inventory->Shredding Container** from the *Main window*.
2. Click on **File -> Print Thermal Label**.
3. The label will automatically be printed by the thermal printer.

6.4.15.7 Adjusting the quantity of shredding containers at a customer

EDC RC tracks the number and type of shredding containers at each customer. (A report is available in the *Report* 364 module 364.)

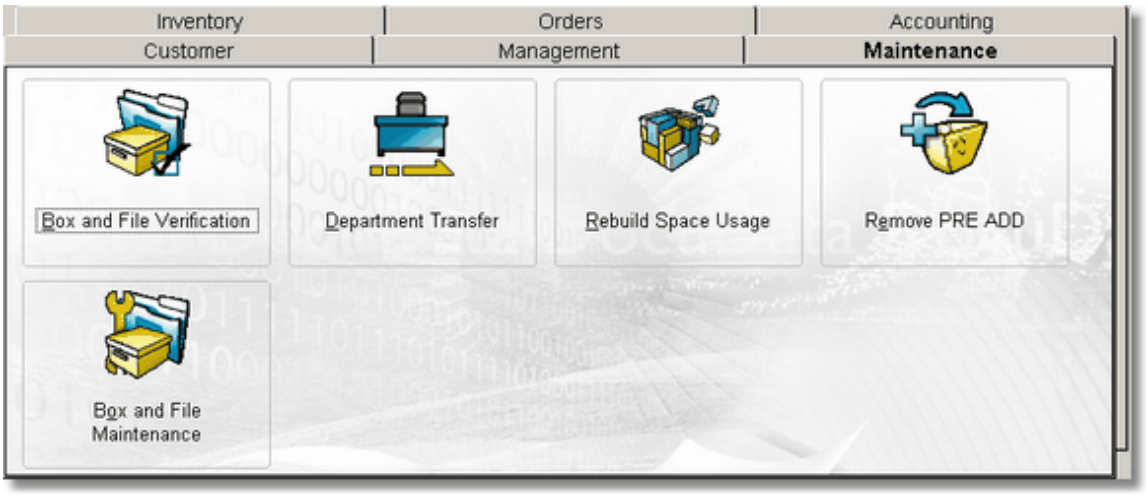
To modify this information:

1. Open the **Inventory->Shredding Container** module.
2. From the menu, select **Edit->Adjust Customer Quantity**.

6.5 Maintenance (Maintenance tab)

6.5.1 Outline (Maintenance)

EDC RC promotes adherence to standard operating procedures to ensure the integrity and smooth functioning of your record center. However, on occasion you may need the flexibility to bypass some of these processes in maintaining your data. Many of these functions are isolated in modules on the Maintenance tab, so that you can restrict access prevent accidental use.



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Modules
- Box and File Verification 446
- Department Transfer 450
- Rebuild Space Usage 454
- Remove PRE ADD 464
- Box and File Maintenance 467

6.5.2 Box and File Verification

6.5.2.1 Overview (Box and File Verification)

This module verifies the integrity of box and file information. It can be useful for correcting errors that may be introduced by exceptions such as computer or network failures.

Available reports
- (see file menu options)

Fields (none)

Tasks
- (see file menu options)

Distinctive menu options:

File menu
- Verify boxes 447
- Verify files 448
- Verify locations 450
- Verify Images 450

Module window:

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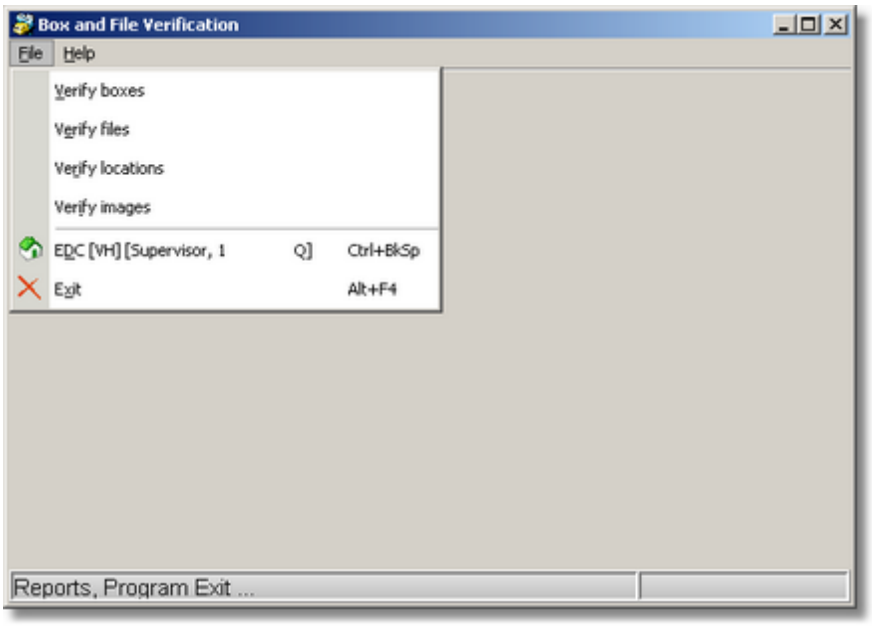
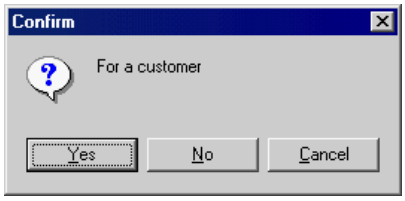


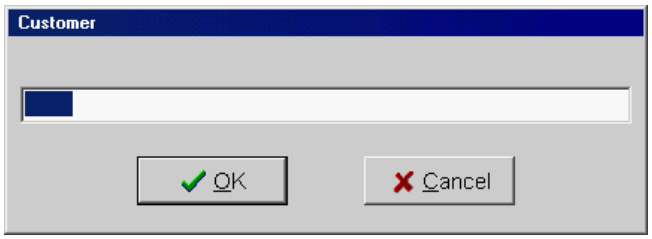
6.5.2.2 Verifying the integrity of boxes

The following verifications were put in place to verify the integrity of the database and of the different items. This should usually be done after importing items in the system via the import function of the *Box and File Maintenance* module. It can also be done if a lot of data entry has been done in the system.

1 Click on **Maintenance**->**Box and File Verification** from the *Main window*.
2 Click on **File**->**Verify boxes**. A dialog box appears and asks if the report must be printed.
3 Click on the **Yes** button, if you want to print the report. A new dialog box opens.



4 Click on the **No** button to produce an overall report or click on the **Yes** button to produce a report for a specific customer. When clicking on **Yes** a window appears.



5 Enter the code of the desired customer and press **OK**. A window appears.

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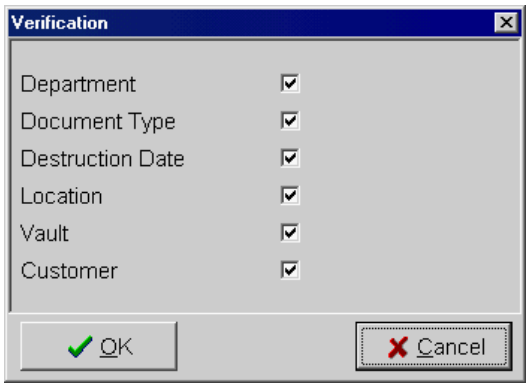
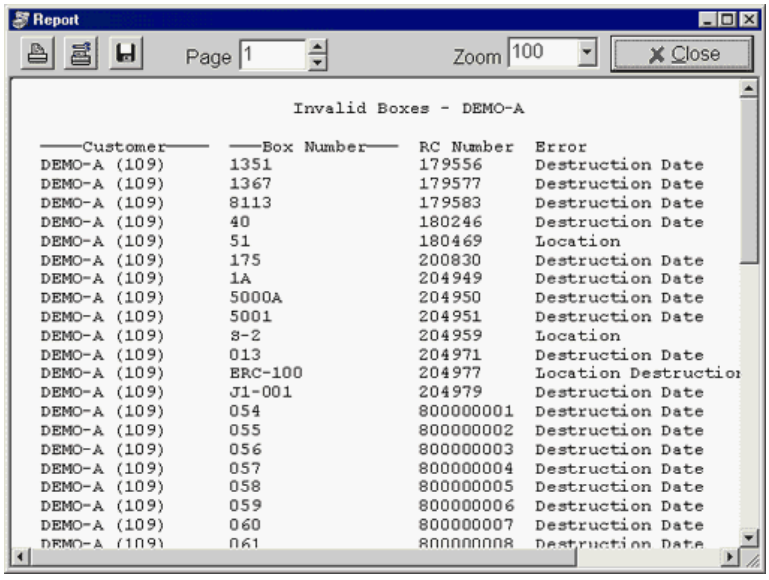


Department - This checks if the box has a valid department and sub department.
Document Type - This checks if the box has a valid document type, it does not check the restrictions that apply to each Document type.
Destruction Date - If the disposal of the item is not locked (FIXED), it checks that the destruction date is properly calculated from the document type.
Location - This checks that the box is assigned to a valid Location (if the box is in the IN or the SELECTED state).
Vault - This checks if the box invault box setting corresponds to the invault settings of the location it is assigned to (ie if the box has the *Vault* option checked, the location it is assigned to should have the *Vault* setting set to YES)
Customer - This checks if the box is assigned to a customer.

6 When needed, uncheck some options to prevent their display on the report and press **OK**. The system automatically prints or displays the report.


Report
Page 1
Zoom 100
Close
Invalid Boxes - DEMO-A
Customer | Box Number | RC Number | Error
DEMO-A (109) | 1351 | 179556 | Destruction Date
DEMO-A (109) | 1367 | 179577 | Destruction Date
DEMO-A (109) | 8113 | 179583 | Destruction Date
DEMO-A (109) | 40 | 180246 | Destruction Date
DEMO-A (109) | 51 | 180469 | Location
DEMO-A (109) | 175 | 200830 | Destruction Date
DEMO-A (109) | 1A | 204949 | Destruction Date
DEMO-A (109) | 5000A | 204950 | Destruction Date
DEMO-A (109) | 5001 | 204951 | Destruction Date
DEMO-A (109) | S-2 | 204959 | Location
DEMO-A (109) | 013 | 204971 | Destruction Date
DEMO-A (109) | ERC-100 | 204977 | Location Destructio
DEMO-A (109) | J1-001 | 204979 | Destruction Date
DEMO-A (109) | 054 | 800000001 | Destruction Date
DEMO-A (109) | 055 | 800000002 | Destruction Date
DEMO-A (109) | 056 | 800000003 | Destruction Date
DEMO-A (109) | 057 | 800000004 | Destruction Date
DEMO-A (109) | 058 | 800000005 | Destruction Date
DEMO-A (109) | 059 | 800000006 | Destruction Date
DEMO-A (109) | 060 | 800000007 | Destruction Date
DEMO-A (109) | 061 | 800000008 | Destruction Date

7 Click on the **Close** button to end the viewing.

6.5.2.3 Verifying the integrity of files

The following verifications were put in place to verify the integrity of the database and of the different items. This should usually be done after importing items in the system via the import function of the *Box and File Maintenance* module. It can also be done if a lot of data entry has been

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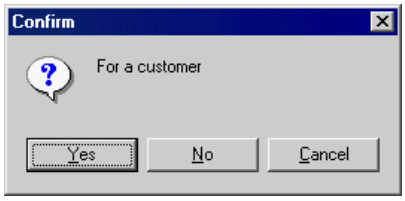
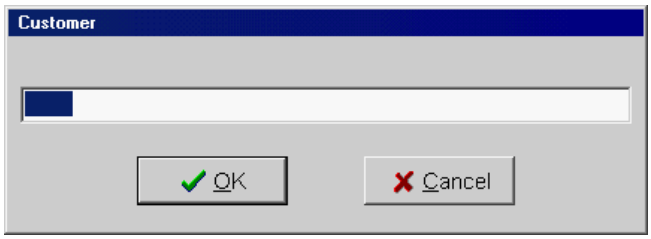
done in the system.

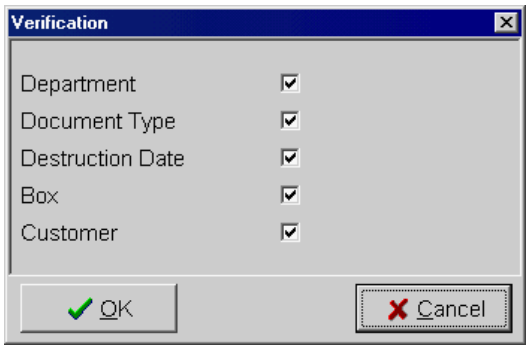
1 Click on **Maintenance**->**Box and File Verification** from the *Main window*.
2 Click on **File**->**Verify files**. A dialog box appears and asks if the report must be printed.
3 Click on the **Yes** button if you want to print the report. A new dialog box opens.



4 Click on the **No** button to produce an overall report or click on the **Yes** button to produce a report for a specific customer. When clicking on **Yes** a window appears.



5 Enter the code of the desired customer and press **OK**. A window appears.



Department - This checks if the file has a valid department and sub department.
Document Type - This checks if the file has a valid document type, it does not check the restrictions that apply to each Document type.
Destruction Date - If the disposal of the item is not locked (FIXED), it checks that the destruction date is properly calculated from the document type.
Box - This checks if the file is assigned to an existing box.
Customer - This checks if the file is assigned to a customer.

6 If so desired, uncheck some options to prevent their display on the report and press **OK**. The system automatically prints or displays the report.

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6.5.2.4 Verifying the integrity of locations

This operations verifies if the amount of boxes IN the location corresponds to the value contained in the field *Used* of the *Location* module.

1. Click on **Maintenance**->**Box and File Verification** from the *Main window*.
2. Click on **File**->**Verify locations**. A dialog box appears and asks if the report must be printed.
3. Click on the **Yes** button if so desired. The system automatically proceeds to the verification of locations and the report is printed or displayed soon after.

6.5.2.5 Verifying the integrity of images

This operations verifies the integrity of data related to images, their indexes, and the files that contain them.

1. From the **Maintenance->Box and File Verification** module, select **File->Verify images**.
2. A confirmation warns that this operation may be very long. (you may want to run it from the server, at a timer when the system is not busy.) Click **Yes** button.
3. Once the images have been verified, a message indicates '*Validation complete*'. If there are any errors requiring attention, a message will appear.

6.5.3 Department Transfer

6.5.3.1 Overview (Department Transfer)

This module allows the transfer of documents between departments and sub-departments for one customer. These operations will modify the information of documents. The changes are viewable in the Box, File and Department modules. To activate the module, it is necessary to select a customer from the file menu.

Available reports

- None (See the *Report* 364 module)

Fields (None)

Tasks

- Transferring a sub-department to another department 451
- Transferring a sub-department to another sub-department 452

Distinctive menu options:

File menu

- Select customer (Select which customer's sub-departments to transfer)

Department menu

- Sub to Main Department 451
- Sub to Sub-Department 452

Module window:

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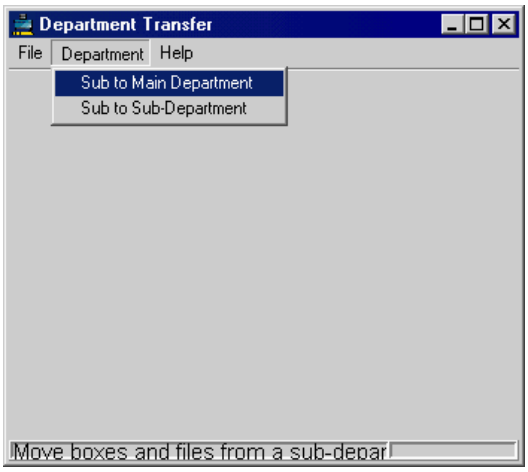
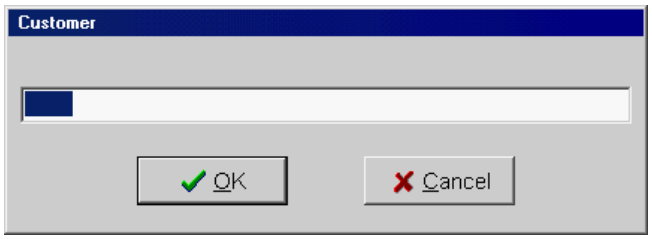


6.5.3.2 Transferring a sub-department to another department

Normally, each department has many sub-departments. In this operation, a sub-department of a department can be reassigned to another department. All the documents of this sub-department still belong to it, but they are moved to another department.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Department Box/File** from the *Main window*.
2 Click on **File**->**Select Customer**. A window appears.



3 Enter the code of the desired customer and press **OK**.
4 Click on **Department**->**Sub to Main Department**. A window opens.

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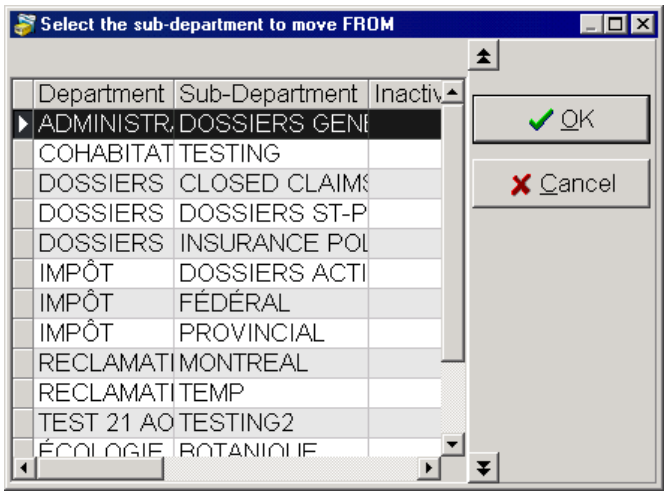
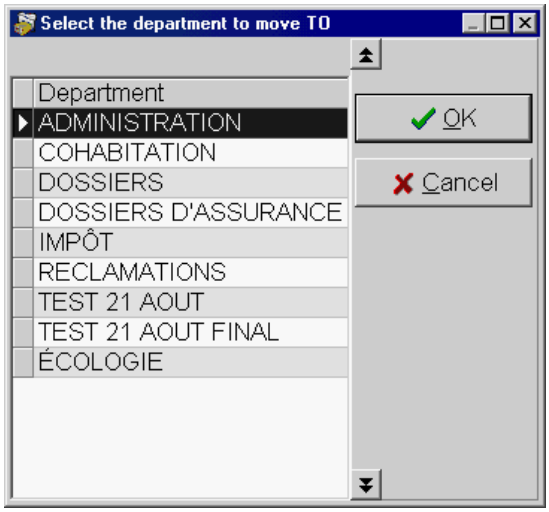


5 Select the sub-department to be transferred (it will appear highlighted) and press **OK**. A window is displayed on the screen.



6 Select the target department (it will appear highlighted) and press **OK**. The system proceeds to the update of the information.

Note : If the sub-department is already in the right main department an error message will appear.

6.5.3.3 Transferring a sub-department to another sub-department

This operation allows the transfer of all the documents from a sub-department to another sub-department. The sub-department transferred is not deleted from the system but is emptied. All its documents are now included in another sub-department and new documents could be added to this sub-department later on.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Department Transfer** from the *Main window*.
2 Click on **File**->**Select Customer**. A window appears.

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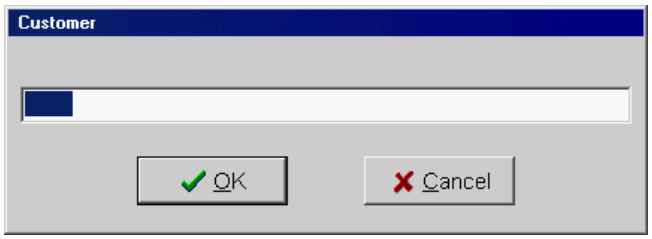
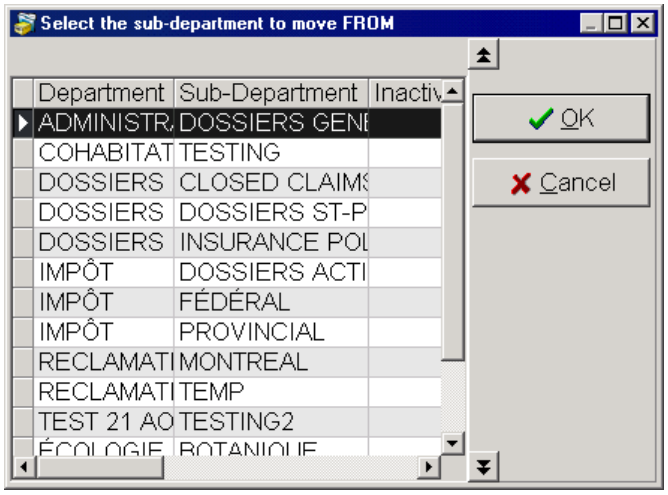
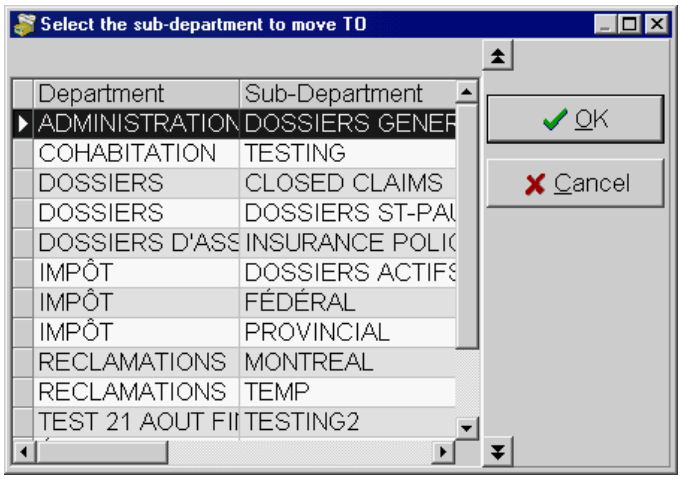


3 Enter the code of the desired customer and press **OK**.
4 Click on **Department**->**Sub to Sub-Department**. A window opens.



5 Select the sub-department to be transferred (it will appear highlighted) and press **OK**. A window is displayed on the screen.



6 Select the target sub-department (it will appear highlighted) and press **OK**. The system proceeds to update the information.

Note: This kind of measure would take place if a sub-department had merged with another sub-department in a company.

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6.5.4 Rebuild Space Usage

6.5.4.1 Overview (Rebuild Space Usage)

This module facilitates maintenance if the system no longer accurately reflects the amount or position of the boxes, or if an area of the record center that currently stores one type of box is to be re-allocated for storage of a different type of box.

Available reports

- Location integrity report - checks for locations where the reported number of boxes in a location in the location table do not match the number of boxes assigned to the location in the box table.

Fields (None)

Tasks

- Recalculating available storage space 454
- Systematically rescanning boxes to correct the inventory
- Re-allocate locations for a different box type

Distinctive menu options:

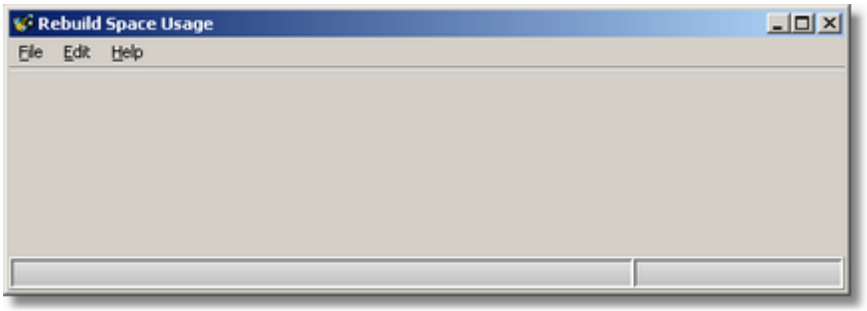
File menu

- View Report -> Location integrity report 455
- Rebuild Space Usage 454

Edit menu

- Rescanning process 457

Module window



6.5.4.2 Recalculating available storage space

This operation re-calculates the available space for each location based on the reported location of each box and tape. It is important to perform this operation after manual operations that affect inventory, such as checking boxes IN or OUT, creating boxes in the IN state, and importing boxes to the IN state.

1. Open the **Management->Rebuild Space Usage** module.

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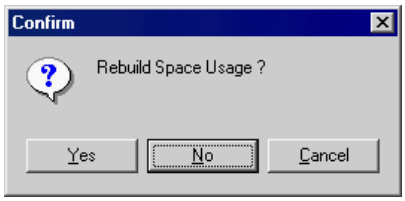
2. Click on **File->Rebuild Space Usage**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. A box is displayed during the treatment and indicates that the system is going through all the locations defined at the record center.

6.5.4.3 Viewing or printing a location integrity report

The system safeguards against integrity errors in most instances. However, operations such as changing customer or location parameters, performing manual maintenance that bypasses the system, or exceptional circumstances may cause inconsistencies to accumulate over time.

The location integrity report cross-checks the database for the following integrity errors:

- Duplicate box label
- Invalid location label (does not match the location mask)
- Non-Existent location label (location assigned to a box does not exist as a location in the system)
- Customer not found
- Location is full
- Exclusive Location (Location of a box has been assigned to a different customer)
- Box must be in vault (or not in vault)
- Customer limited to a building

integrity erIn principle these errors should not occur if all boxes and locations have been managed since the beginning using the
regarding is report is a tool that might be helpful before re-scanning the warehouse, it will tell you about any inconsistencies in your inventory.

It is used to preview what the inconsistencies in you inventory look like before hand for a particular section or your whole warehouse.

This report can also be ran every few months simply to verify that your inventory is in good shape.

1 Click on Management->Rebuild Space Usage from the Main window.
2 Click on File->View report->Location Integrity report. A window appears.

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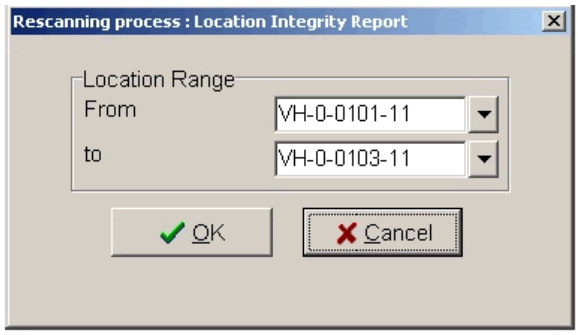
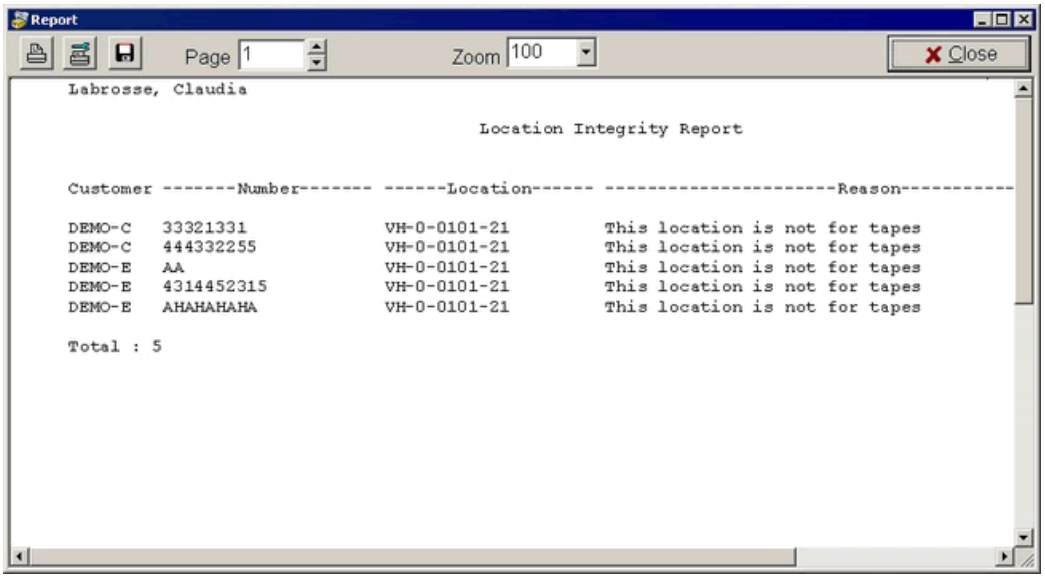


Note: The location range and transit location fields will no doubt have different values than the ones indicated
in the picture but will reflect your own locations.

3 Enter a Location Range and Press OK. The report will appear on the screen for you to review.

Ex:


Report
Page 1
Zoom 100
Close
Labrosse, Claudia
Location Integrity Report
Customer -------Number------- ------Location------ ----------Reason----------
DEMO-C 33321331 VH-0-0101-21 This location is not for tapes
DEMO-C 444332255 VH-0-0101-21 This location is not for tapes
DEMO-E AA VH-0-0101-21 This location is not for tapes
DEMO-E 4314452315 VH-0-0101-21 This location is not for tapes
DEMO-E AHAHAHAHA VH-0-0101-21 This location is not for tapes
Total : 5

Here is a list of possible integrity errors the report will show:

- Duplicate box label
- Invalid location label
- Non-Existent location label
- Customer not found
- Location is full
- Exclusive Location
- Box must be in vault/or not
- Customer limited to a building

4 To print the report, press on the Print button.

You can now start the Rescanning process 457 if you desire.

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6.5.4.4 Rescanning process

Before considering rescanning locations, it would be important to run the location integrity report 455 .

The following topics will guide you in the process of re-scanning your warehouse. The reasons why you might want to do this are:

- Your inventory has become mixed-up over time and you need to re-validate your current inventory
- You need to assign certain areas of your warehouse to specific box volume and capacity

Note: *In order for the re-scanning process to be done properly, we suggest that you:*

- Create/Use a DIFFERENT transit location for your re-scanning process than the ones you usually use in your daily operations. If more than one employee re-scans at the same time, a different transit location for each employee should be used. You'll also need to create another transit location that will be used for the "Lost Boxes". You don't need to create more than one location for the lost boxes (you can if you really want to but that might become harder to keep track of and manage).

- Be aware of what is in this location BEFORE you start a new re-scanning job so that you don't waste time dealing with boxes that are not part of your re-scanning process (Although if the re-scanning process is done right, your transit location should be empty after each successful re-scan).

- Whoever does the re-scanning should make the other employees of the record center aware of this (with verbal communication and also perhaps by placing some cones in front of the section being scanned). The reason for this is that pickers should NOT refile boxes in the section being re-scanned as this can lead to inconsistencies in EDC.

- Only do a small section at a time. This will help you find lost boxes faster in the concerned section if ever need to do so. It will also keep your section's refiling downtime to a minimum when doing so.

1. Click on **Management**->**Rebuild Space Usage** from the *Main window*.
2. Click on **Edit**->**Rescanning process**

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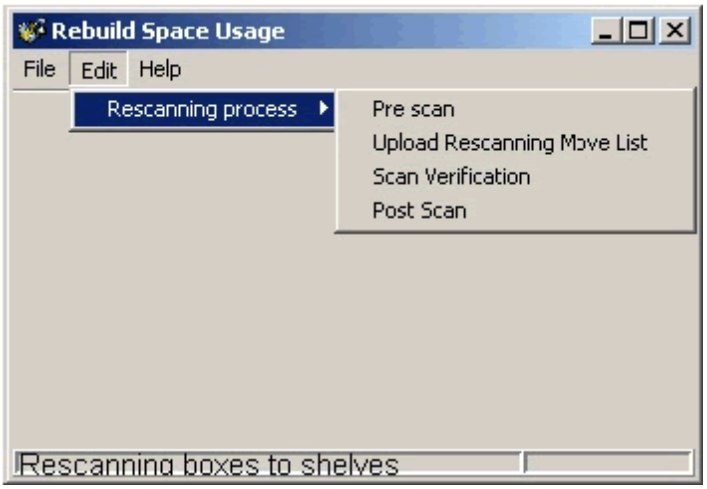
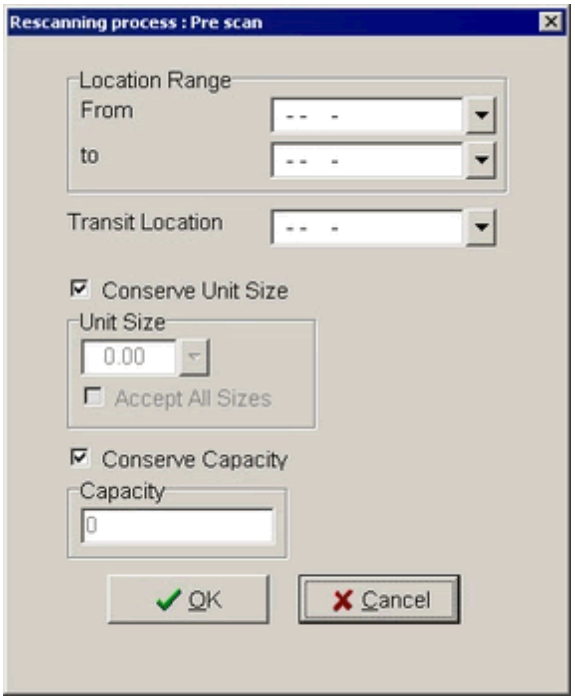


See the following topics for a detailed step by step procedure :

- Pre scanning items 458
- Uploading a rescanning move list 460
- Verifying the scan 461
- Post scanning 461

6.5.4.4.1 Pre scanning

1 Click on **Management**->**Rebuild Space Usage** from the *Main window*.
2 Click on **File**->**Edit**->**Rescanning process**->**Pre scan** . A window appears.



Note: The location range and transit location fields will no doubt have different values than the ones indicated
in the picture but will reflect your own locations.

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What the fields mean:

- **Location Range** : This corresponds to the range of locations you currently want to do the scanning

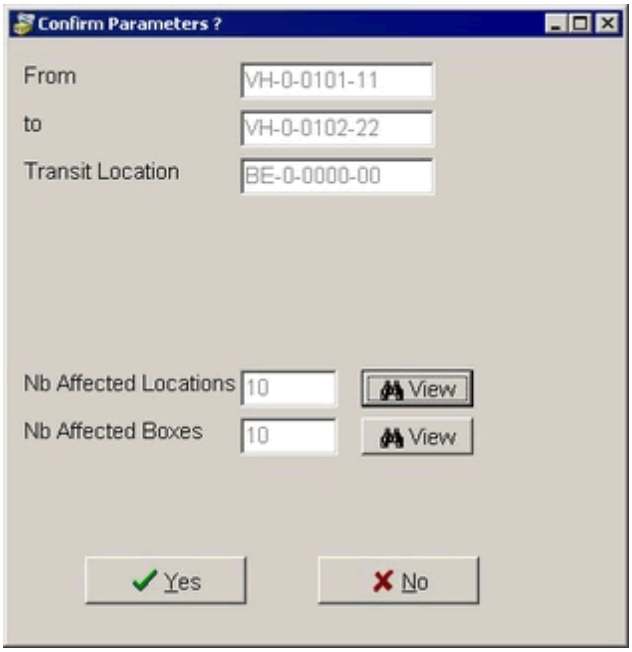
for. You probably won't want or even have the time to do your whole warehouse at once and so these fields enable you to scan your warehouse one section at a time if needed.

- **Transit Location** : This is the location where the boxes from the "Location Range" above get moved to after the Pre Scan step is complete.

Note that there is no actual need to physically move the boxes to that location.
The re-scanning process is basically just a "fancy" move and so during the re-scanning process EDC transfers the boxes to that transit location to be able to make a proper move from the transit location back to their actual shelf locations.

- **Unit Size Options** : These options are used to either change your location range's unit size or to leave it as is. If you don't want to make changes to your unit size, you simply leave this option as is. Otherwise if you wish to assign a new value you just deselect the "Conserve Unit Size" option and choose a new value or you can select the "Accept All Sizes" if you wish to allow all box sizes.
Same goes for the capacity option.
The Unit size and Capacity options at this point only affects the Locations from the Location module.
The boxes are not affected at this point.

3 Enter the different parameters and press **OK**. A window appears.



4 To view the report of affected locations or the report of affected boxes, press on the **View** button beside the field. The report will automatically be previewed.

5 Press **OK** to confirm the parameters. A confirmation message appears :

Ex:

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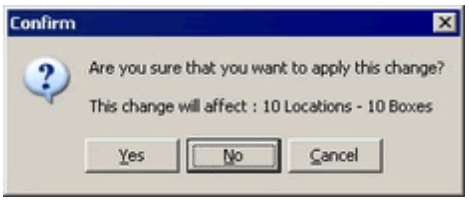

6 The location of the boxes will be changed for the transit location that was previously selected.

7 A move with the PDT[108] should now be performed.

6.5.4.4.2 Uploading a rescanning move list

Before uploading this move list, consult the following topics :

- Rescanning process[457]
- Pre scanning items[458]

1 Click on **Management**->**Rebuild Space Usage** from the *Main window*.
2 Click on **File**->**Edit**->**Rescanning process**->**Upload rescanning move list**.
3 Prepare the PDT to send information (**Send results** -> **Move**).

The results of the move are analysed. The system :

- Updates the locations of the boxes in the box module and may change the state of the boxes depending on the previous state they were in. All boxes retain their original state except for boxes that were in the "OUT" and "PRE ADD" state. These states get changed to "IN" after the upload.

- Creates an error report if your move conflicts with the size & capacity of the locations you are scanning

and will keep the boxes in the transit location in such a case, at which point you will have to deal with
those boxes on a case by case basis and figure out what needs to be done.

Here is a list of possible errors and warnings contained in the report:

Will produce error if:	Will produce warning if:
invalid box label	Box size not matching location size
non-existent box	Activity changed (Out & Preadd to in)
box on deletion list	
box in terminal state (Deleted, Transferred & Destroyed)	
invalid location label	
non-existent location label	
Customer not found	
Location is full	
Exclusive Location	
Box must be in vault/or not	
Location can't contain tape	
Customer limited to a building	

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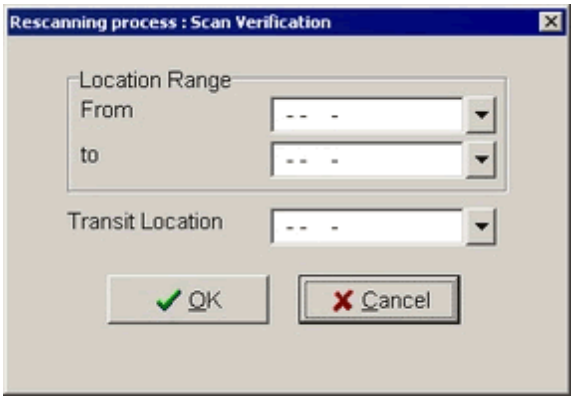
6.5.4.4.3 Verifying the scan

This step is simply a report of your Move Upload. It summarizes all the boxes that have been left in the transit location due to move errors. It also shows the location's capacity that you should appear in the Location module.

1 Click on **Management**->**Rebuild Space Usage** from the *Main window*.
2 Click on **File**->**Edit**->**Rescanning process**->**Scan verification**. A window appears.



Note: Normally the locations that have been entered in the previous steps will appear in the *Location Range* and the *Transit Location*.

3 Press **OK**. A double report is automatically created.

If the report shows that some boxes are still in the transit location this usually mean that there has been
an error during the move (skipped a box during the scan?).

It would be important to re-check if you have indeed skipped a box and re-scan the boxes in these locations, then re-upload the move results again.

If you are sure that no boxes were forgotten and the report still shows that there is boxes in the transit location, refer to the Post scanning 461 operation, at which time the remaining boxes from the transit location will be moved to the "lost boxes" transit location.

In summary, you should repeat the rescanning process (move, upload results, verification) as many times as you think necessary until the boxes are found, if some are not, the Post scanning 461 operation should be performed.

6.5.4.4.4 Post scanning

This step is used to move the boxes that were left in the transit location, to the "Lost Boxes Transit Location" . The system can also adjust the capacity and volume of both the locations and boxes accordingly. It also "cleans" the transit location to be ready for another re-scanning session

1 Click on **Management**->**Rebuild Space Usage** from the *Main window*.

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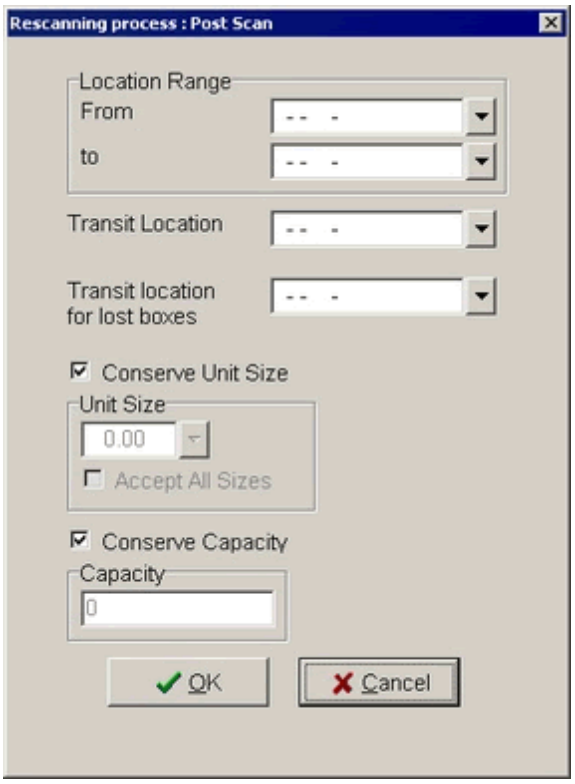
2 Click on **File**->**Edit**->**Rescanning process**->**Post scan** . A window appears.



NOTE: Make sure that the transit location is empty (except for lost boxes) before doing this because otherwise it will
move those items to the "Lost Boxes" transit location. Something we don't want to happen when doing this.

Take note that these changes are done to the boxes AND the locations if the unit size is changed.

3 Choose a *Location Range*, and change the *Capacity* and the *Unit Size* if need be. Press **OK**. A window appears.

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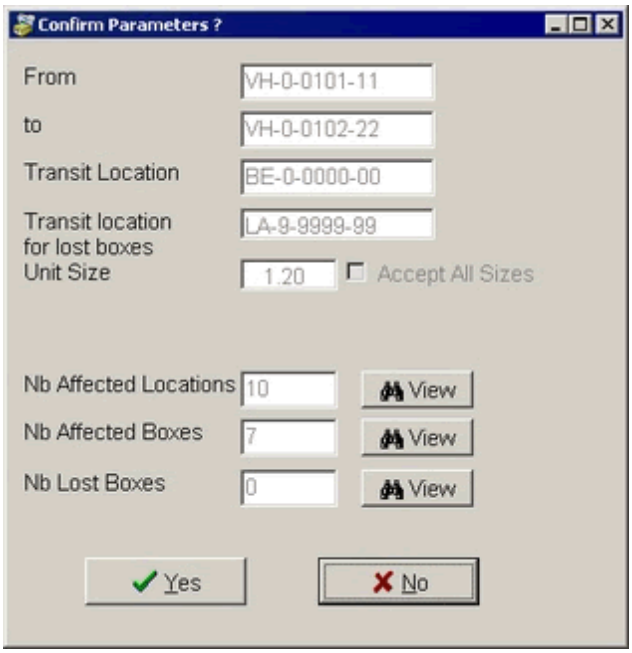
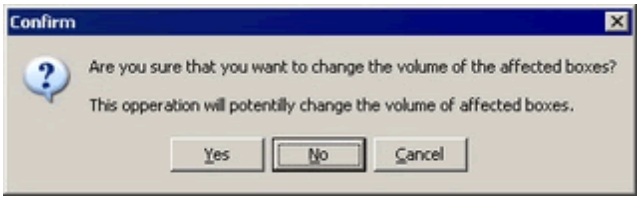


4 To view a report of affected locations, affected boxes or lost boxes, press on the **View** button at the right of the field.

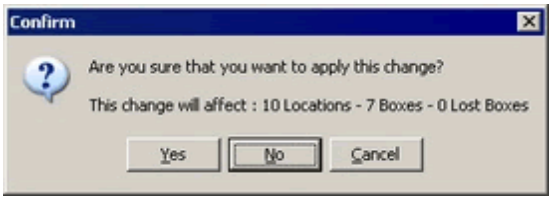
5 If you want to continue with the changes, press *Yes*. If you want to cancel the operation press *No*.

6 If *Yes* was pressed, a warning message is displayed :


Confirm
Are you sure that you want to change the volume of the affected boxes?
This opperation will potentilly change the volume of affected boxes.
Yes
No
Cancel

7 If you want to continue with the changes, press *Yes*. If you want to cancel the operation press *No* or *Cancel*.

8 If *Yes* was pressed, another warning message is displayed :


Confirm
Are you sure that you want to apply this change?
This change will affect : 10 Locations - 7 Boxes - 0 Lost Boxes
Yes
No
Cancel

9 If you want to continue with the changes, press *Yes*. If you want to cancel the operation press *No* or *Cancel*.

10 If *Yes* was pressed, a password is demanded. Enter your password and Press **OK**.

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11 The changes will be applied in the Box and/or the Location modules.

12 The amount of errors encountered is displayed.

6.5.5 Remove PRE ADD

6.5.5.1 Overview (Remove PRE ADD)

PRE ADD boxes have identities in EDC RC but have not yet been added to the inventory. Customers can affix labels for tracking and record information about the boxes using ActiveWeb. However, the record center has never assumed any responsibility for these boxes, and they may not even exist. Therefore, it is possible to delete PRE ADD box and file records from the system.

This module permits the batch-deletion of boxes in PRE ADD for a customer.

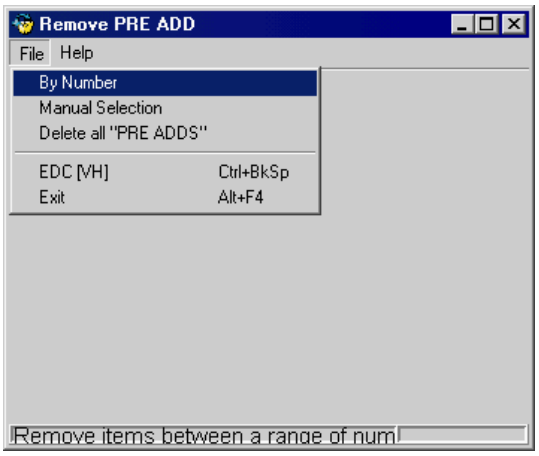
Available reports
- None.

Fields
- None.

Distinctive menu options:

File menu
- By Number (Delete boxes in PRE ADD for a customer within a range of customer box numbers). 464
- Manual Selection (Select boxes from a list to remove from PRE ADD) 465
- Delete all "PRE ADDS" (delete all PRE ADD boxes of a customer) 466.

Module window:



6.5.5.2 Batch deleting boxes in PRE ADD for a customer

This operation deletes boxes in *PRE ADD* falling within a range of customer box numbers for a customer.

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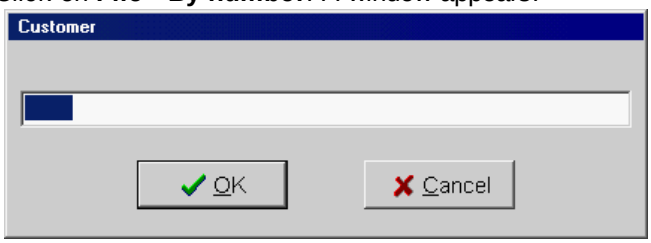
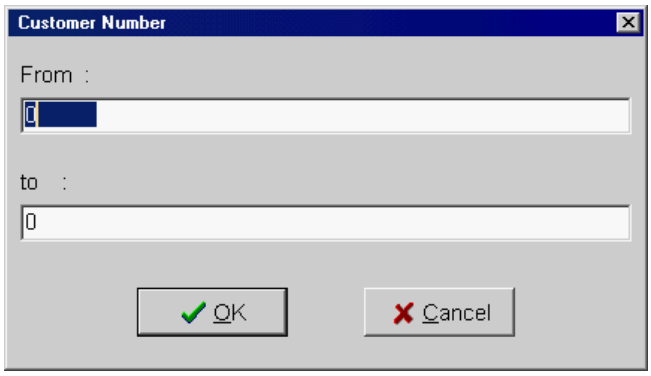
WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

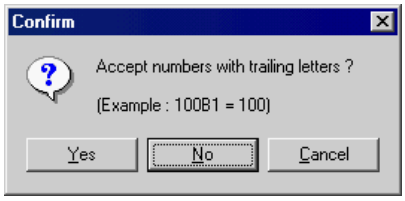
1. Click on **Maintenance->Remove PRE ADD** from the *Main window*.
2. Click on **File->By number**. A window appears.



3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter an interval of number of boxes and press **OK**. A dialog box opens on the screen.



5. Click on the **Yes** button to include numbers containing letters. The system automatically proceeds to the deletion of all the boxes in PRE ADD for which their number is included in the interval previously entered. As soon as the deletion is approved, all the data about these boxes disappear and is not retrievable anymore.

6.5.5.3 Manually selecting boxes to delete from PRE ADD for a customer

This operation allows to delete specific PRE ADD boxes.

WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

1. Click on **Maintenance->Remove PRE ADD** from the *Main window*.

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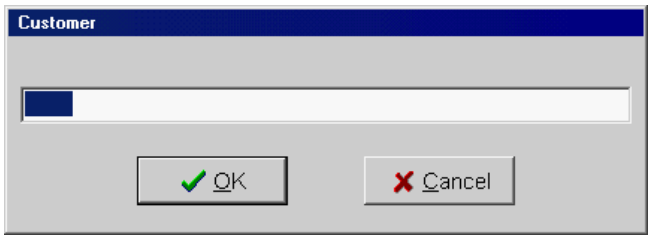
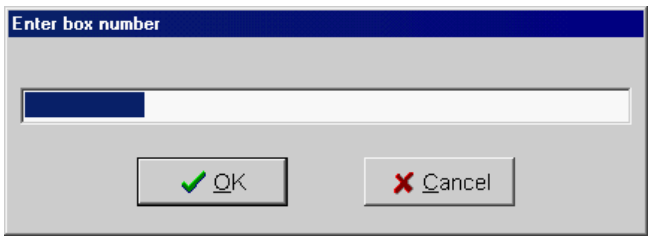
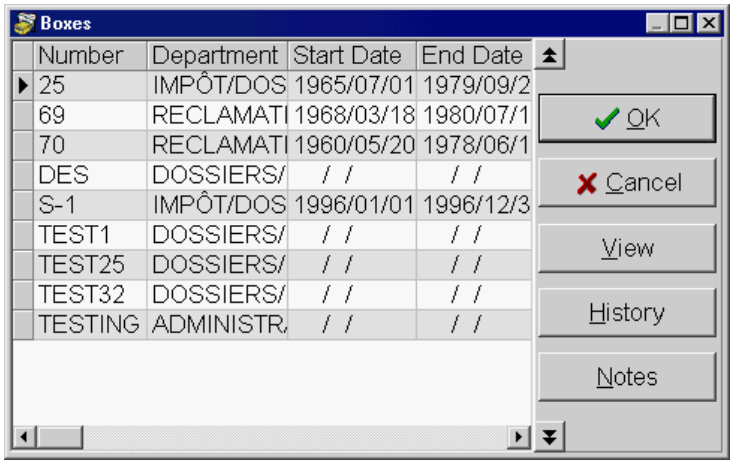
2. Click on **File->Manual Selection**. A window appears.



3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter the number of a box to be deleted and press **OK**. A window opens, containing the list of all the boxes in PRE ADD for this customer.



5. Select the desired boxes (they will appear highlighted) and press **OK**. The system automatically proceeds to the final deletion of these boxes in the inventory.

6.5.5.4 Deleting all the PRE ADD boxes of a customer

With this operation, all the PRE ADD boxes of a customer are deleted from the inventory. It is necessary to first ensure that the customer does not have any valid boxes in PRE ADD before performing this operation.

WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

1. Open the **Maintenance->Remove PRE ADD** module

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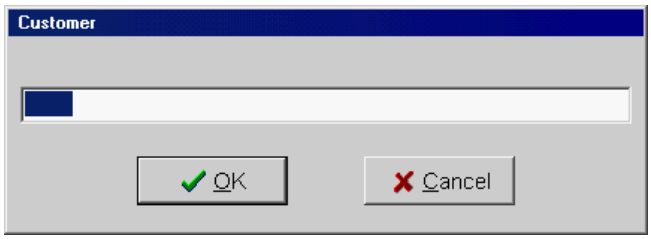
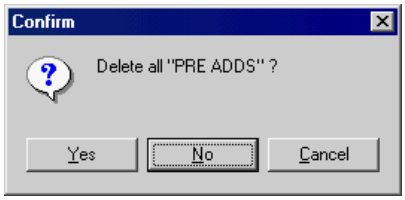
2. Click on **File->Delete all "PRE ADDS"**. A window opens.



3. Enter the code of the desired customer and press **OK**. A dialog box appears.



4. Click on the **Yes** button to confirm the operation. After deletion, all the information about these boxes disappears permanently from the system.

6.5.6 Box and File Maintenance

6.5.6.1 Overview (Box and File Maintenance)

This module permits maintenance operations that do not fall within the standard work flow for boxes and files. It should be used with caution.

Available reports
- Replication log
- Replication times

Fields (none)

Distinctive menu options:

File menu
- Print alternate labels (Printing alternate labels for boxes and files 480)
- Auto-create PRE ADD boxes (Auto-creating boxes in PRE ADD and printing bar code labels 481)
- Auto-create PRE ADD files (Auto-creating files in PRE ADD and printing bar code labels 482)
- Auto-create PRE ADD tapes 481
- Import (Importing data using a description file 483)
- Import data with wizard 484
- Import images (Importing images 496)
- Upload vault transfer move list 497
- Upload resize move list 497
- Index customers 497

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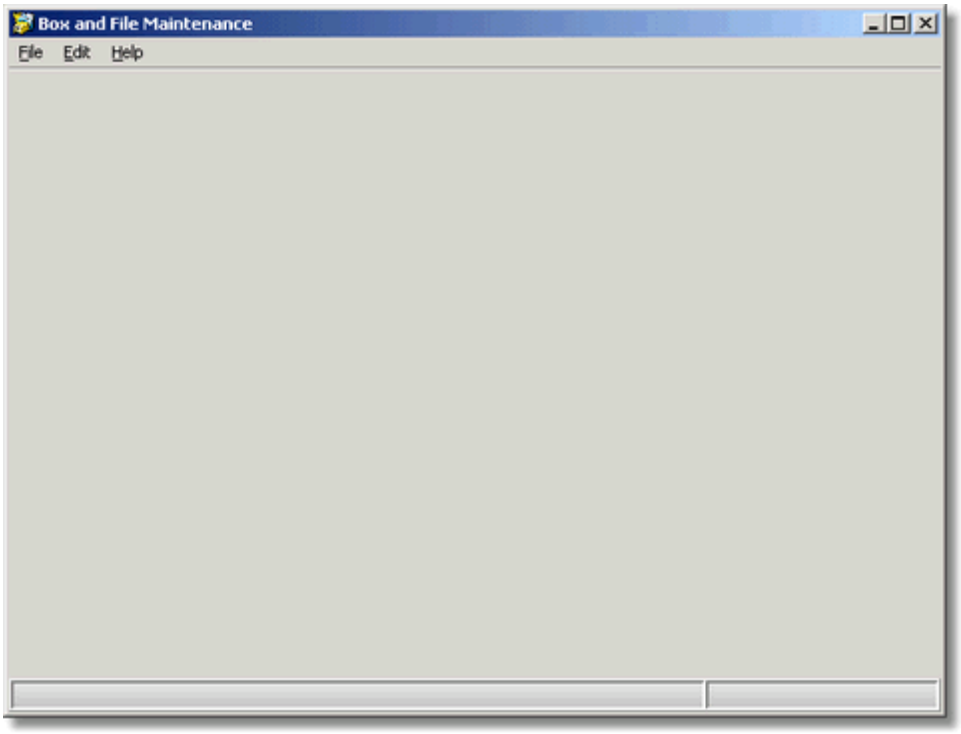
- Replication log 498
- Replication times 498

Edit menu

- Check IN box 468
- Check OUT box 468
- Check IN file 468
- Check OUT file 468
- Transfer box to PRE ADD 470
- Transfer file to PRE ADD 470
- Edit box history 470
- Edit file history 470
- Field Update (Updating fields for boxes and files 477)
- Field Transfer (Transferring the content of fields for boxes and files 472)
- Inter-client move (Transferring boxes of a customer to another customer 473)
- Adjust box disposal from files 475
- Recover boxes from backup 498
- Recover files from backup 498
- Delete all images in a file 499

Module window:



6.5.6.2 Individually returning or retrieving a box or a file

This operation can be useful to correct errors which occur during returns or deliveries. Unless otherwise informed, there is no charge for these operations, because the documents are already supposed to be returned or retrieved.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **Edit ->Check IN Box**|**Check Out Box**|**Check In File**|**Check Out File**. A window

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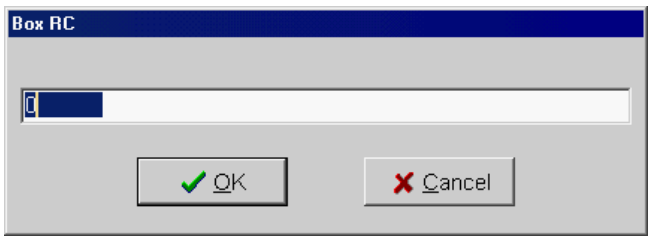
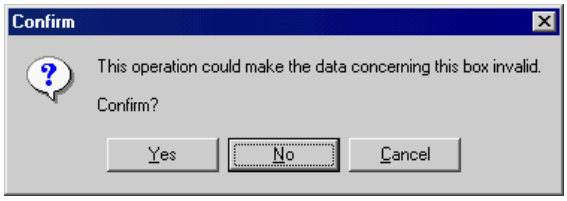
appears and allows to specify which customer is concerned.

3 Enter the code of the customer and press **OK**. A window opens.



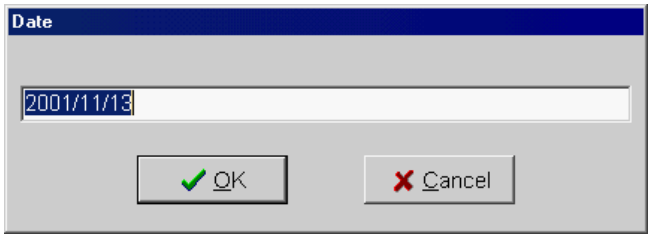
Note : A similar window appears for files.

4 Enter an RC number and press **OK**. A dialog box appears.



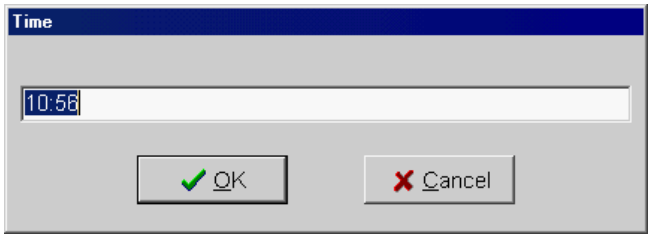
Note : Documents which are retrieved must be in the PRE ADD or OUT state, and documents which are returned must be in the IN state.

5 Click on the **Yes** button to confirm the operation. A window is displayed on the screen.



Note : The current date is displayed by default. This date will appear in the document's history, in order to indicate the retrieval or return date.

6 Modify the date if so necessary and press **OK**. A window appears.



Note : The current time is displayed by default. This time will appear in the document history, in order to indicate the retrieval or return moment.

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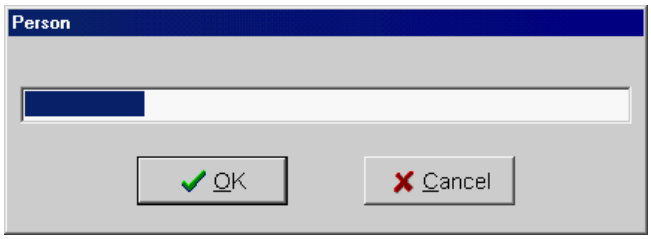
7 Modify the time if so desired and press **OK**. According to the operation that is being performed, the system proceeds as follows :

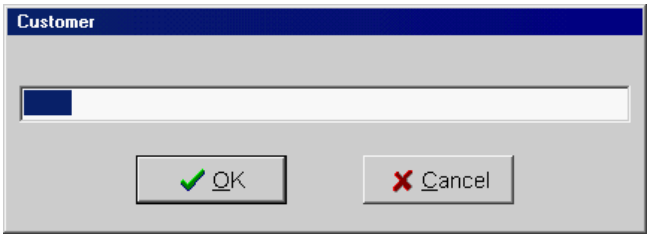
- When returning a document, the update of information is automatic. The changes are viewable in the *Box* and *File* module.
- When retrieving a document, a window appears.



Enter the name of the person to which the document was delivered and press **OK**. The information is updated in the *Box* and *File* modules.

6.5.6.3 Transferring a box or a file to PRE ADD

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **Edit-> Transfer Box to Pre Add**|**Transfer File to Pre Add**. A window appears.



3 Enter the code of the customer in question and press **OK**.
4 Enter the RC number of the desired document in the window that is displayed and press **OK**. The system proceeds to the update of the information and the state of the document is changed to PRE ADD.

6.5.6.4 Editing the history of a box or a file

Every operation performed on boxes and files is registered in their history. This information can be consulted in the *Box* and File modules by clicking on **F3**. Generally it is better to keep the original information but it can be necessary to change some of them, such as described here.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **Edit ->Edit Box History**|**Edit File History**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the desired customer and press **OK**.
4 Enter the RC number of the desired document in the window that is displayed and press **OK**. A window opens on the screen.

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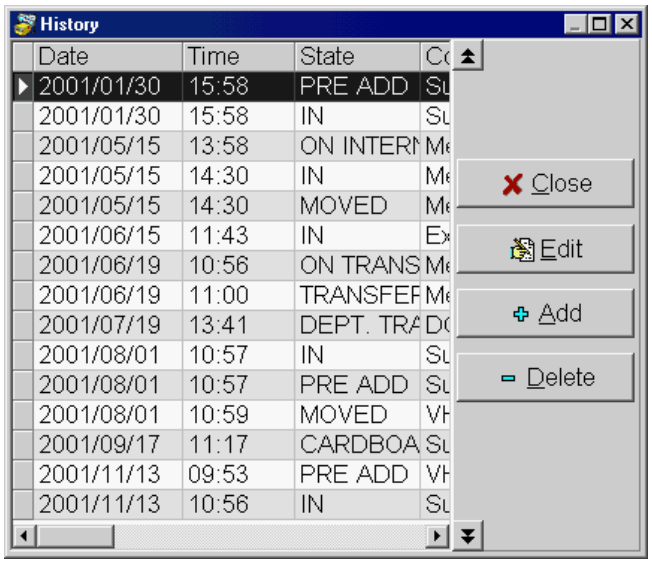
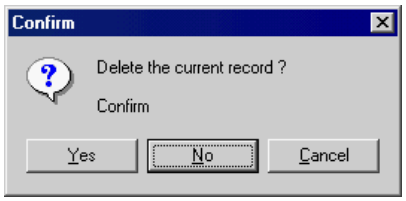


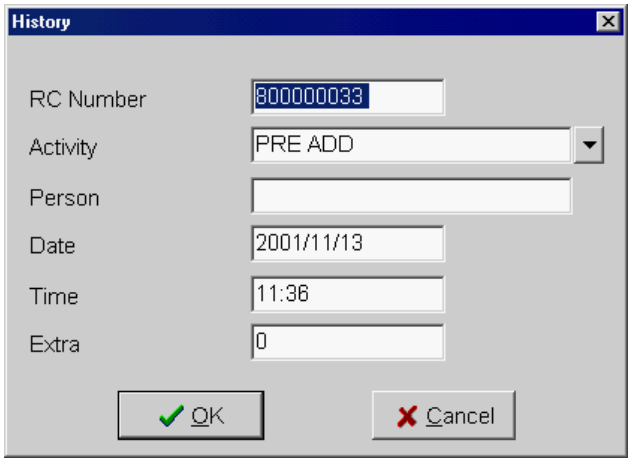
5 Performing one of the following operations :

- To delete a part of the history, select the desired line (it will appear highlighted) and click on the **Delete** button. A dialog box appears.



Click on the **Yes** button to confirm the operation.

- To add information to the history, click on the **Add** button. A window appears.



RC Number : this field indicates the RC number given to the document by the system and cannot be modified.
Activity : this field allows to specify an activity for the document.

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Person : this field allows to enter the name of the person related to the action (recipient, requester, etc).
Date : this field allows to enter a date for the action. The current date is displayed by default but can be modified. The new line is displayed in the history according to this date.
Time : this field allows to enter a time for the action. Consequences are the same as for the date.
Extra : this field allows to enter additional information.

Enter the correct information in the appropriate fields (see their description below) and press **OK**. This information will be displayed in the history of the document on a new line.

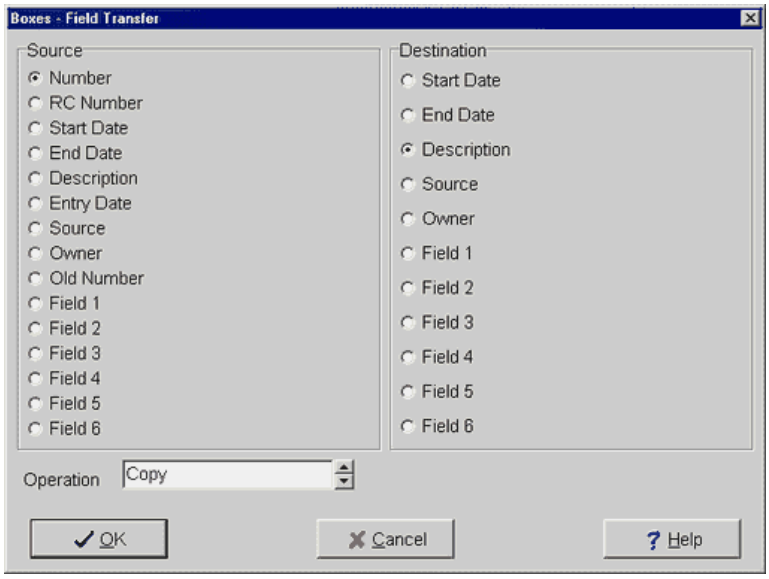
- To modify an existing part of the history, select the related line (it will appear highlighted) and click on the **Edit** button. Proceed to the desired changes as done previously when adding new information to the history.

6 When finished, click on the **Close** button.

6.5.6.5 Transferring the content of fields for boxes and files

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **Edit**->**Field Transfer**->**Boxes|Files**. A window appears and asks to specify which customer is concerned.
3 Repeat steps **3** to **8** inclusively from the previous section to establish a selection of documents. Here is the window displayed after following these steps.



4 Check a *Source* field and a *Destination* field, select the operation to be performed by clicking on the drop-down button. Three operations can be performed :

- *Copy* : the content of the *Source* field is copied in the *Destination* field; the original content of the *Destination* field disappears; the *Source* field does not change.
- *Swap* : the content of the *Source* field is transferred to the *Destination* field and vice versa. The original content of both fields is kept but not displayed at the same place.

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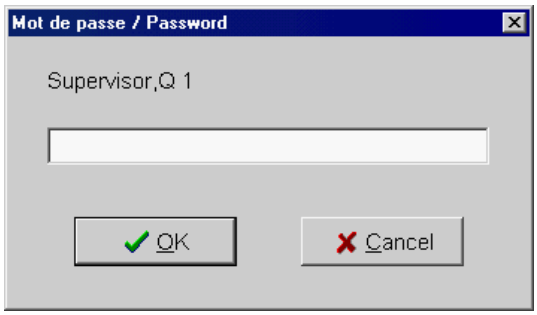
- *Move* : the content of the *Source* field replaces the content of the *Destination* field; the original content of the *Destination* field is deleted; the *Source* field is emptied.

5 Press **OK** to register the operation. Some dialog boxes appear and allow to confirm the operations. They also notify the user of the major changes that can occur in the inventory after having performed these operations.

6 Press **OK** in all of these dialog boxes. A window appears.



7 Enter the password and click on the **OK** button. The system automatically updates the inventory. The relevant modifications are viewable in the *Box* and *File* modules (a general change will appear in the history of the selected boxes or files.)

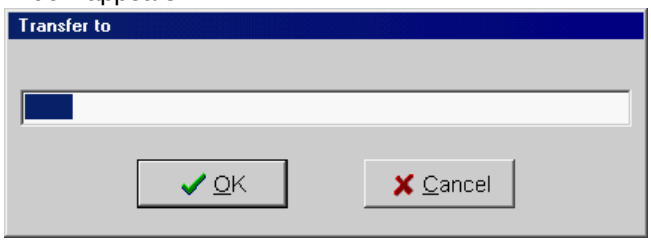
6.5.6.6 Transferring boxes of a customer to another customer

Companies may merge or divide, and it is not uncommon for professionals to move from one firm to another, bringing customers and records with them.

Before doing an inter-client move it is important to check that all the returns for both customers are in the VERIFIED state, and that no items are on internal transfer lists.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **Edit->Inter-client Move**. A confirmation dialog box appears
3. Click on the **Yes** button. A dialogue box prompts *Transfer From*.
4. Enter the customer key of the customer for which boxes will be transferred and press **OK**. a window appears.



5. Enter the customer key of the customer to which boxes are transferred and press **OK**. A dialog box appears and asks to confirm the intent to transfer between these two accounts.

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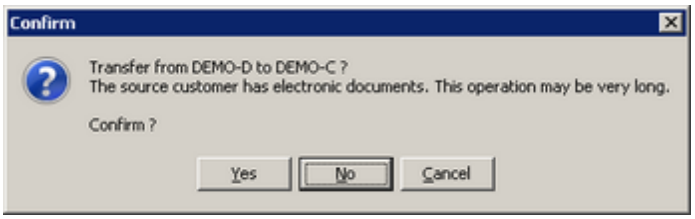
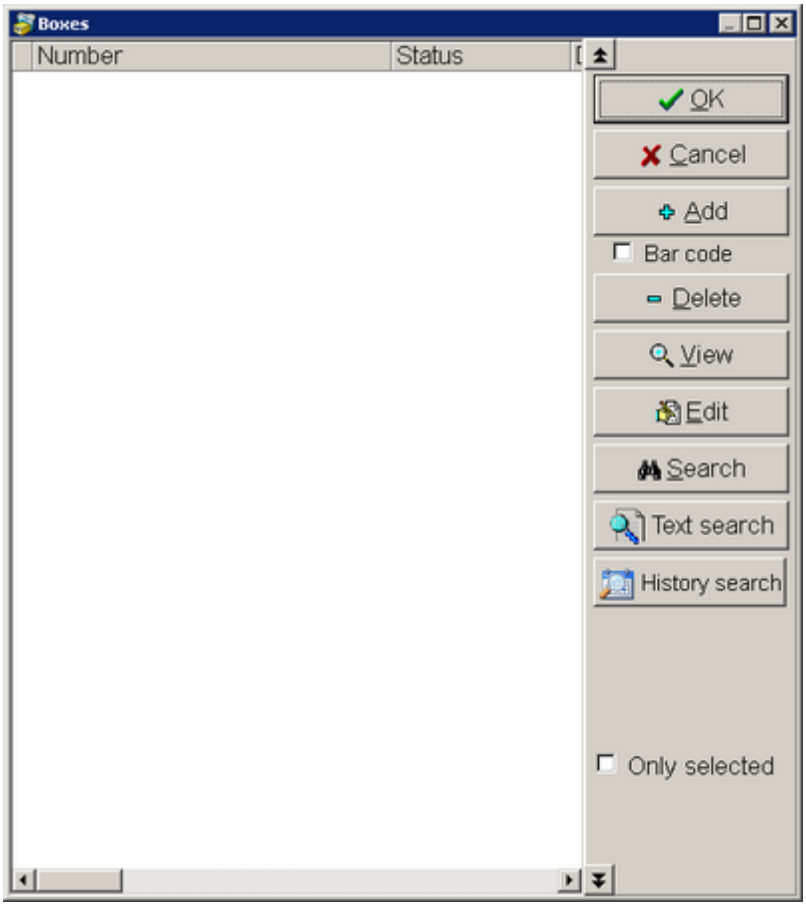


6. Click on the **Yes** button to confirm the operation. A window appears for building a list of boxes to transfer.

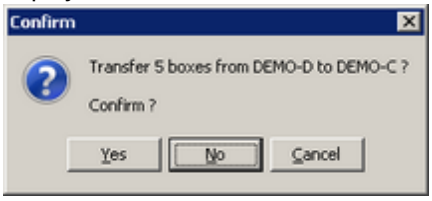


7. Build a list of boxes to transfer using any of the standard box searches 356.

Note that if the "Only selected" box at the bottom is checked, only those items highlighted in black will be transferred.

8. Press **OK** when finished.

- If some boxes are on an internal transfer list or on a delivery that is not verified, a report is displayed. Either resolve the situation, or remove the items from the list, then press **OK** again.



9. Click on the **Yes** button to confirm the transfer. The system automatically updates the inventory. Records in the old account are marked as *Transferred*. Items in their new account will have the current status of the physical item. The barcode of the box will be added as an "alternate label", since the new record has a different customer number and different RC number.

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Note: Once an inter-client move has been performed, the customer key on the old label will no longer match the account that it belongs to. This makes the truck validation step even more important. It may also be worth re-labeling these boxes as they are encountered on returns.

6.5.6.7 Updating the disposal date of a box based on files

EDC manages destruction by the box destruction date, but sometimes customers provide destruction information on the files rather than the box. This function determines the most rigorous disposal mode and the latest disposal date on files in the box, and will increase the disposal on the box to match if necessary, and sets it to FIXED disposal. Withdrawn files and boxes are ignored. The disposal date or mode will never be reduced.

Disposal modes: PERMANENT > SEND TO DEPOT > SAMPLE > REVISION > CONFIDENTIAL > NON CONFIDENTIAL > NONE.

When this operation changes disposal parameters it adds history items indicating the previous disposal and who performed the change.

1. From the **Maintenance->Box and File Maintenance** module, select **Edit->Adjust box disposal date from files**.
2. A confirmation box appears, "Adjust box disposal from files ?" Click **Yes** to confirm.
3. A dialogue box appears, "Customer". Enter a **customer key** and click **OK**, or click **OK** to select a customer from the list.
4. A box selection window[351] appears. Use this search functionality to build a list of boxes to modify.

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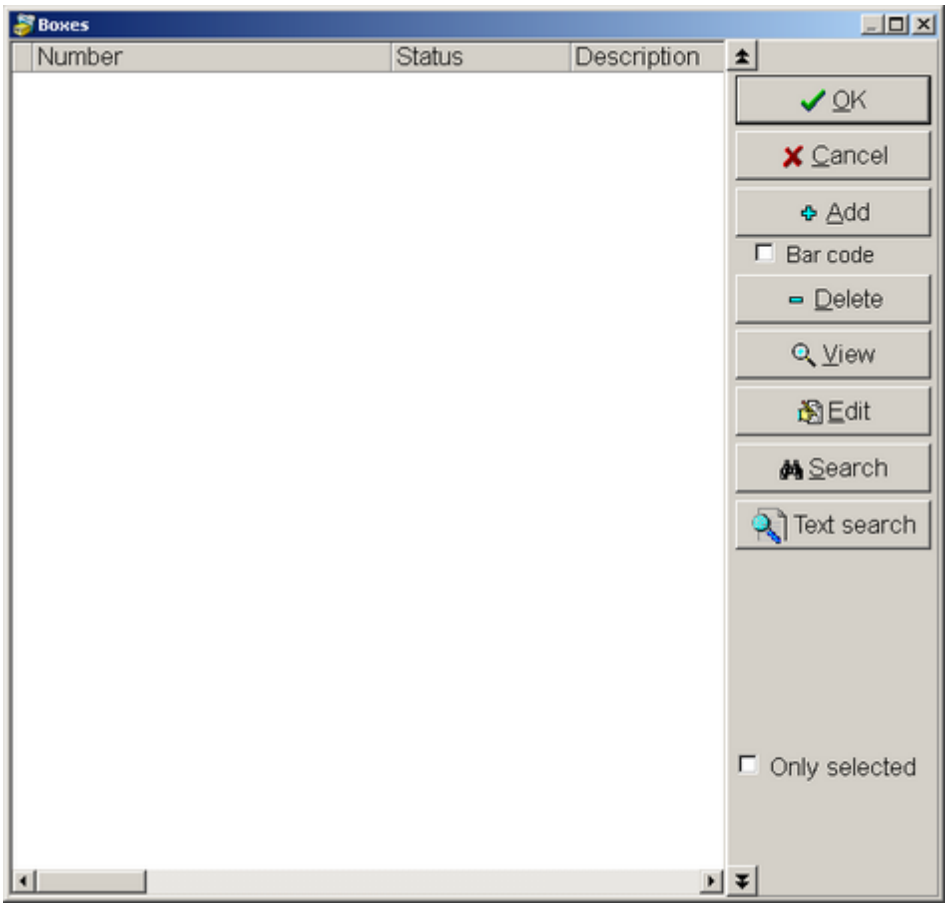
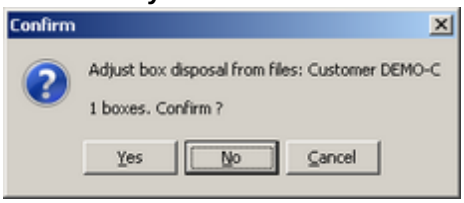
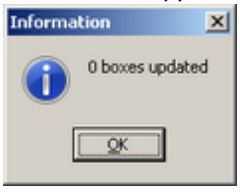


5. Click **Okay**.



6. A confirmation window appears. Click **Yes** to confirm.
7. Type your password and click **Okay** or press **Enter**.
8. If any of the boxes require updating, the boxes will be updated and their disposal calculation will be set to Fixed.
9. A window appears, displaying the number of records that have been changed.



If boxes were permanent and had files that were not, a report will list all such boxes and the percentage of files that are permanent within that box.

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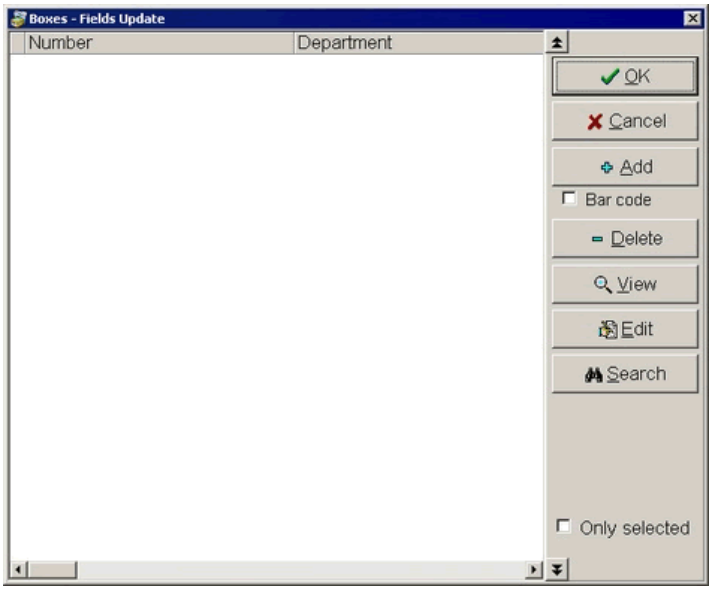
6.5.6.8 Updating fields for boxes and files

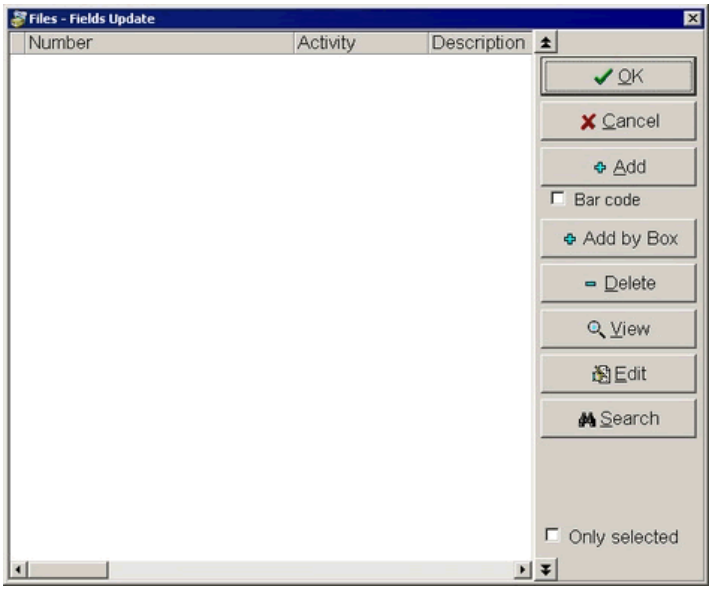
WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **Edit**->**Fields Update**->**Boxes|Files**. A window appears and asks to specify which customer is concerned.
3 Enter the customer key (to have the list of customers press **OK** -- select a customer and it will appear highlighted) and press **OK**. A window appears.

When updating boxes:



When updating files:



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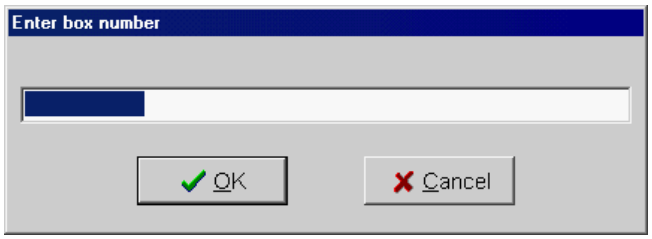
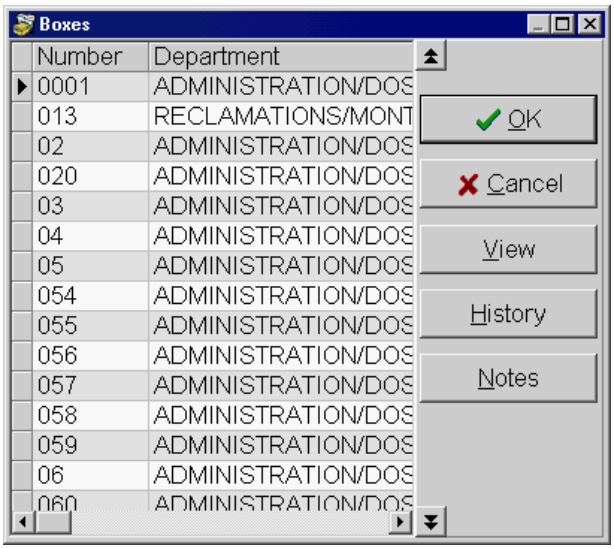
- Click on the **Add** button to select documents. A new window appears.



Note : As for files, a dialog box appears previously and asks to specify if the selection will be established by number or description.

Enter a number or a description to indicate where to start in the selection list and press **OK**. The list of documents appears.



Select the desired documents (they will appear highlighted) and press **OK** . The window opened in **3** reappears and contains all the documents previously selected.

- To remove documents, select them and click on the **Delete** button. A dialog box appears for each deletion and asks to confirm the operation.

- To edit the information of a record, select a record (it will appear highlighted) and click on the **Edit** button.

1 When all the documents desired are in the list press **OK**. A window appears and may be different, according to the option chosen in **2** (box or file update).

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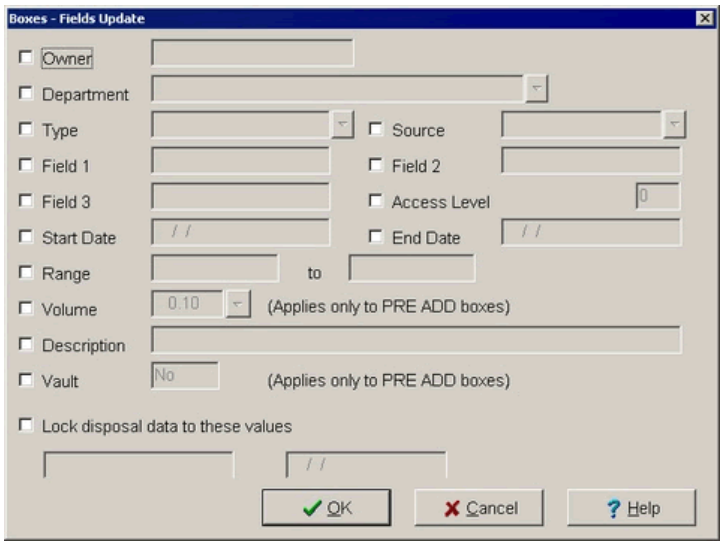
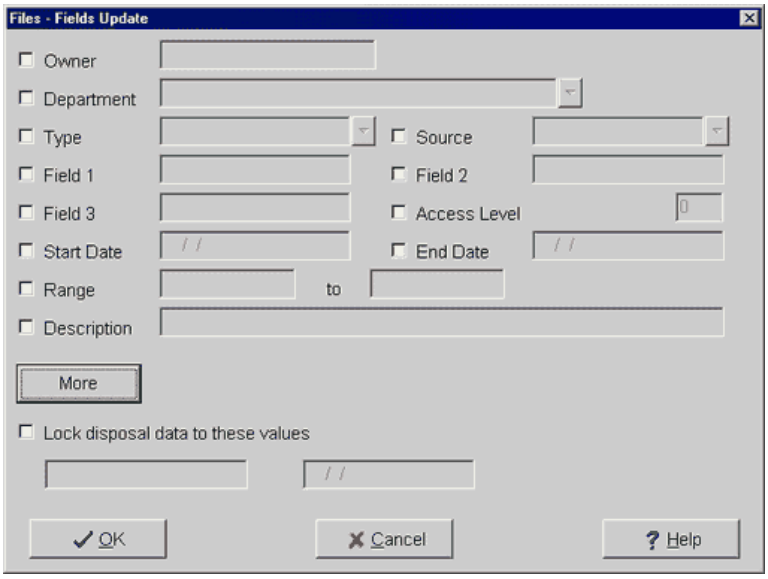


or



Note : When clicking on the **More** button, the following window appears. It allows to update the extra fields for files.

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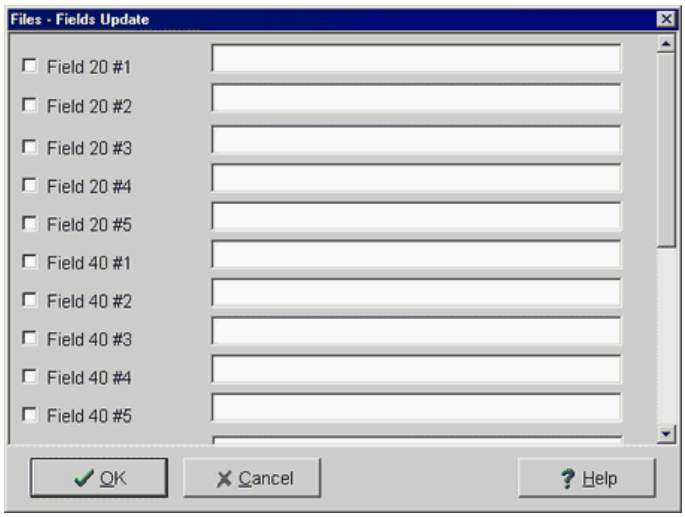


9 Check the fields to be modified (it will activate them) and enter the desired information. When all has been done, press **OK** to register the modifications that will be applied. The system automatically updates the relevant information in the inventory. All these modifications will be viewable in the *Box* and *File* modules (a general change will appear in the history of the selected boxes or files.)

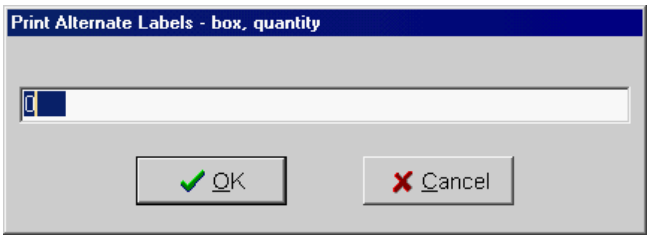
10 The system will go back to the window opened in step **3**.

6.5.6.9 Printing alternate labels for boxes and files

Note: Use of this option is not recommended.

This function prints thermal labels with sequential numeric bar codes. These can then be affixed to boxes or files as alternate bar codes when returning them with the PDT 138 or when adding it in PRE ADD to the inventory (Box and File modules).

1. Open the **Maintenance->Box and File Maintenance** module and click on **File->Print Alternate Labels ->Box|File**. A window appears.



2. Enter the quantity of labels to print and press **OK**. The labels are automatically printed on the thermal printer attached to the workstation, starting with the number after the last alternate label of this type to be printed.

Note : The bar codes of these labels are generated according to the parameters set for the Alternate Bar Code Lengths 197 field in the System Information module. When many lengths are defined for boxes or files, the system considers the greatest length.

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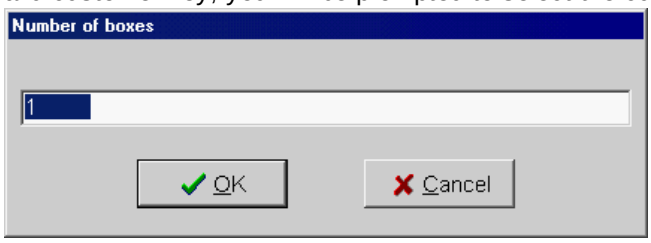
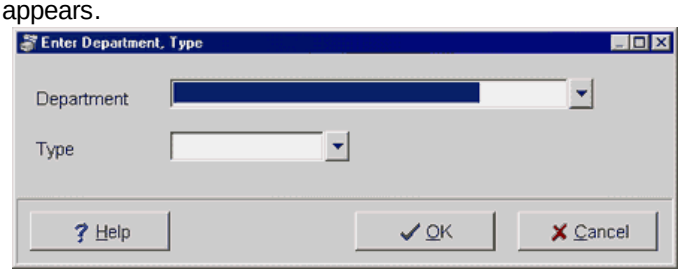
6.5.6.10 Auto-creating boxes or tapes in PRE ADD

This operation will simultaneously print a label and create a record for one or more boxes or tapes in PRE ADD status, permitting customers to label their new tapes and record relevant information in preparation for sending them to the record center.

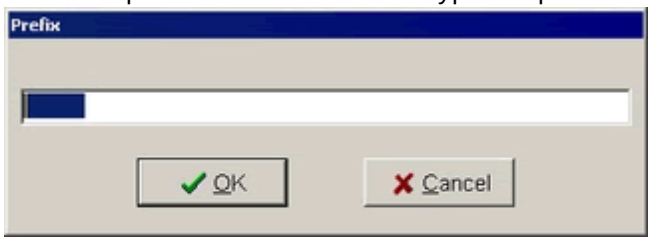
1. From the **Maintenance->Box and File Maintenance** module, select **File->Auto-create PRE ADD Boxes | tapes->Thermal**.
2. Specify the customer by entering the customer key and pressing **Enter**, (if you do not enter a valid customer key, you will be prompted to select the customer from a list).



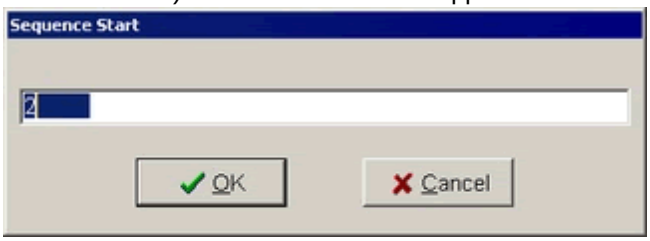
3. Enter the desired quantity of boxes or tapes to create and click on the **OK** button. A window appears.



4. Select a department and a document type and press the **OK** button. A window appears.



5. If the customer requires a prefix on the label, enter one. (the prefix will appear before the auto-created number) Press **OK**. A window appears.



6. The system will default to a number one higher than the previous number used in auto-creating boxes or tapes for this customer. Accept this number or change it if necessary. Press **OK**. A window appears.

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7. Enter the number of copies of labels desired. (typically 1)

8. With a thermal printer, labels are automatically printed. An information box appears and indicates that boxes or tapes have been created. Press **OK**.

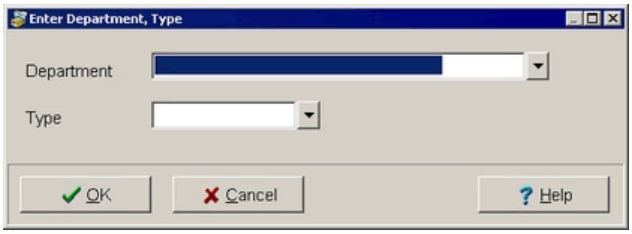
(If you are creating labels using a laser printer, a window appears, prompting you for the position of the first unused label. You may also be prompted to select a label template. Labels are printed soon after on the default laser printer of the system.)

9. The information box appears to indicate that boxes or tapes have been created. Press **OK**.

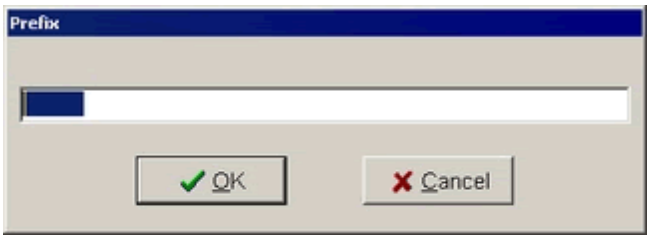
6.5.6.11 Auto-creating files in PRE ADD

This operation is used to create in advance RC numbers for files which do not exist yet. These numbers will appear as PRE ADD in the *File* module and could be assigned later to real files. In order to identify properly these documents, bar code labels printed here can be affixed on them.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Auto-Create PRE ADD Files**->**Thermal|Laser**. A window appears and asks to specify which customer is concerned.
3 Enter the customer key and click on the **OK** button. A window appears.
4 Enter the desired quantity of files to create and click on the **OK** button. A window appears.



5 Select a department and a document type and press **OK**. A window appears.



6 Enter a prefix for the file if desired (the prefix will appear before the auto-created number) and press **OK**. A window appears.

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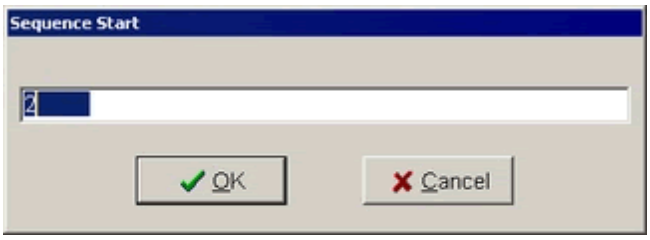
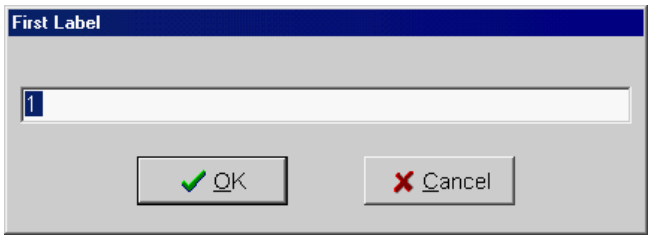


7 Enter a number from which the auto-creation will begin (ex: if you select 4, all the files' numbers will be from 4 and up) and press **OK**. The system automatically adds files in PRE ADD, viewable in the *File* module and containing the department, the type and the number as the only information. A window appears.

8 Enter the number of copies of labels desired.

9 If a laser printer is being used, a window appears.



Enter a number to specify the position of the first label on the sheet inserted in the printer and press **OK**.

If the customer has more than one label template, a list of these templates appears for you to choose. Select one in the list and press **OK**.

Labels are printed soon after on the default printer of the system.

10 An information box appears to indicate the number of files that have been created.

Note : If you exit the operation after the files have been created, the system will start at the number where it left last and it will save the prefix separately for box and file auto creation, to be suggested as default for next time.

6.5.6.12 Importing data

Data may be imported into the system. For additional information, see the the related chapter (Importing data 667).

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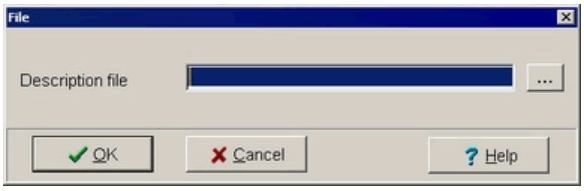
1. Click on **Maintenance->Box and File Maintenance** from the *Main window*.
2. Click on **File->Import data**. A window appears.



3. Browse to the description file[669] by clicking the ... button. A window appears.
4. Select the description file and Press **OK**.
5. The file will be imported and the software will automatically give you a preview.

6.5.6.13 Importing data with a wizard

6.5.6.13.1 Importing data with a wizard - principles

1) Data is created in an excel or CSV file (in this case the data will be the information about boxes or files that one imports, it can be the box number, the department, etc.)

2) The wizard enables you to associate values from the data file or set default values for certain fields. Then, certain options can be specified so that the process can be somewhat faster or more specific.

3) The wizard creates a description file (the role of the description file is to pinpoint where to find the data in the data file, and in which field to put it in EDC RC).

4) A test can be performed by the import wizard to make sure that there are no problems with the description file (this is highly recommended). A report is then issued to help correct mistakes (when the case arises).

5) The importation takes place according to the settings previously chosen and records are added or updated in EDC RC.

See the related topics for more information :
- Step by step procedure[485]
- Check List[494]

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6.5.6.13.2 Step by step procedure

WARNING

This operation ***cannot be undone***. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

This importation wizard simplifies the importation of boxes and files into the system. To import any other information, see the Importing Data 667 topic.

** To make sure the importation goes smoothly, a check list was created so that you can verify if each step is performed correctly. This check list also mentions specific exceptions, so it is advisable to take a look at it prior to and during the importation (see the Check list 494 topic)

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Import data with wizard**. A window appears.

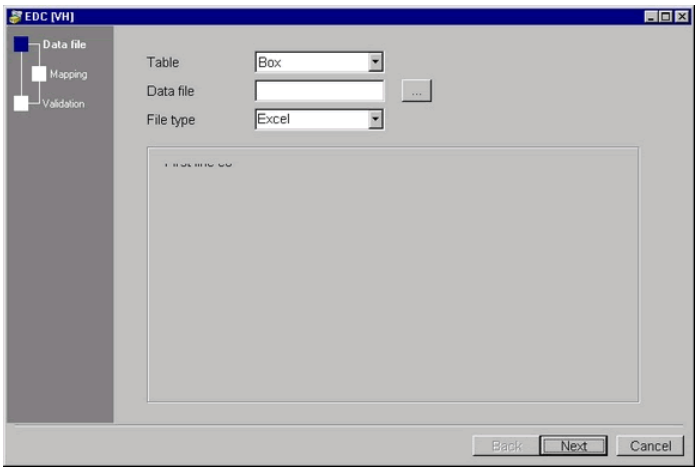

Table - Drop down list including these choices: Box and File. This indicates what type of item you want to import.
Data file - Click on the browse button to select a file. This file should include all the information you want to import.
File type - Drop down list including these choices: Excel and CSV (A file with Comma Separated Values).

First line contains headers - Check box that must be checked when the first line of the Excel spreadsheet or CSV file contains headers.

Separator - Field that is only visible when the CSV file type is chosen.
A separator is a character that divides the different information (it can be a comma, a period, an

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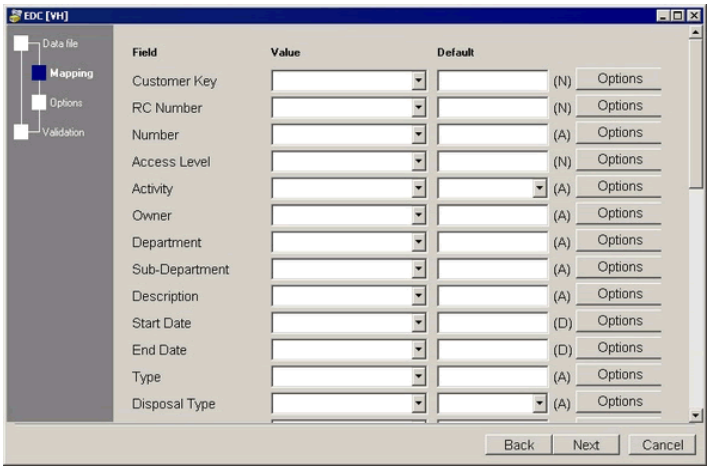
apostrophe, etc.) For a complete list of separating characters, see the topic called List of separating characters 364. Make sure that the separator entered is the same one that is present in your data file.

Delimiter - Field that is only visible when the CSV file type is chosen.
A delimiter is the same thing as a separator, but the delimiter must always be different from the separator in each CSV file. For a complete list of delimiting characters, see the topic called List of separating characters 364.

EX: 'fee-001','DEMO-E','PreAdd','general','general'
In this sequence of information, the separator is a comma(,) while the delimiter is an apostrophe (').

3 When the all options have been selected and the data file has been chosen, press on the **Next** button. A window appears.



Note: If you checked the *First line contains headers* checkbox during step **2**, the names of the columns (either in the excel or the CSV file) will appear in the value drop-down list. If you haven't checked it, the values that were contained on the first line of your file will appear in the list.

4 Fill in the form:

- Associate fields to values by selecting a value in the drop-down list beside the field.

or

- Enter or select a default value in the empty field or the drop-down list. This value will be automatically imported in the field of the box or file module for all the items in the data file. *The default value should only be selected or entered if a* ***Value*** *has not been selected.*

** The required fields for the importation are the following :

For boxes
Box number
Customer key
Activity
Department name
Sub-department name
Type

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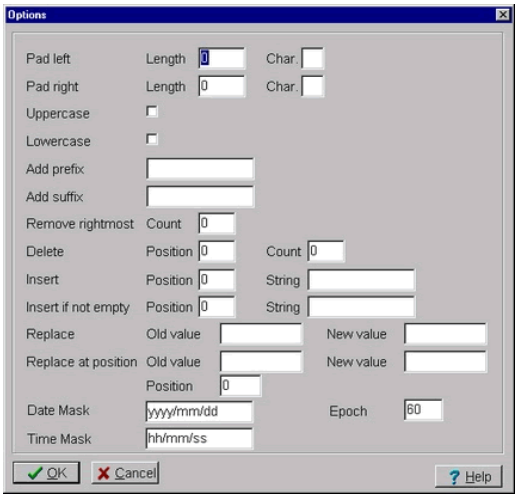
Volume
Location (only when the Activity in IN)

For files
File number
Box number or Location (only when the Activity in IN)
Customer key
Activity
Department name
Sub-department name
Type

These fields can either be set as default values or a value needs to be selected in the list, otherwise the wizard will give you an error message if one of these fields is missing.

- To modify the values in the data file or to specify something in particular for a field, press on the **Options** button. A window appears.



Pad left - The field's value will be padded to the left with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Length - This specifies the length of the value after adding a char.
Char - The character that will appear at the left of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '0006'

Pad right - Similar to Pad Left, but the padding is added to the right. The field's value will be padded to the right with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Length - This specifies the length of the value after adding a char.
Char - The character that will appear at the right of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '6000'

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Uppercase - Boolean field that converts the field's value to upper case letters.
Ex: If a field's value is 'Hello!', after Uppercase, it will become 'HELLO!'

Lowercase - Boolean field that converts the field's value to lower case letters.
Ex: If a field's value is 'Hello!', after Lowercase, it will become 'hello!'

Add prefix - The value specified in this field will be added at the beginning of the field's value.
Ex: If a field's value is 'Smith', and 'Dr.' is added as a prefix, it will become 'Dr.Smith'

Add suffix - The value specified in this field will be added at the end of the field's value.
Ex: If a field's value is 'Dr. Smith', and ' Jr.' is added as a suffix, it will become 'Dr. Smith Jr.'

Remove rightmost - The 'count' characters will be deleted from the right side of the field's value.

Count - This specifies the number of characters to remove from the right.

Ex: If a field's value is 'Hi there', and the count value is 6, it will become 'Hi'.

Delete - The amount of characters specified in the *Count* field will be deleted from the field's value starting from the value specified in the *Position (*where the first character is considered at position 1.)

Position - This specifies where the deletion starts.
Count - This specifies the number of characters to delete.

Ex: If a field's value is 'IceCreamEater', and a delete modification is done (Position =4 and Count= 5), it will become 'IceEater'.

Insert - The value of *String* will be inserted in the field's value before the position indicated by *Position* (where the first character is considered at position 1.)

Position - This specifies where the values specified in the *String* field will be inserted.
String - This specifies the values inserted.

Ex: If a field's values are 'Fruits juice', after the modification (*Position* = 7 and *String* = '& Cream'), it will become 'Fruits & Cream juice'.

Insert if not empty - This option has the same behaviour as the insert conversion except it will only insert the specified character string if the imported data is not empty. If the imported data is only "spaces" it will be considered as empty. See the example for ***Insert***.

Position - This specifies where the values specified in the *String* field will be inserted.
String - This specifies the values inserted.

Replace - If the field's value is the same as the one specified in the *Old value* field, it will be replaced by the value of the *New value* field. If one of the field values contains a comma (,) character, then it needs to be enclosed in brackets ("").

Old value - This is the old value that the system will look for and replace with the new value.
New value - This is the new value that will replace the old value.

Ex: If the field's value is 'IN', after doing a Replace (Old value = IN and New value = Received), it

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becomes 'Received'.

Replace at position - This is the same thing as ***Replace***, but the behaviour is to replace the specified string only if it is present at the indicated position.

Old value - This is the old value that the system will look for and replace with the new value.
New value - This is the new value that will replace the old value.
Position - This is the position where the *Old value* is supposed to be found in order to be replaced.

Ex: If a field value is 'ExampleOne' and another one is 'OneExample' and the Replace at position is performed with these settings: Old value = One, New value = Two, Position = 1. The field value 'ExampleOne' will remain the same, but 'OneExample' will changes to 'TwoExample'.

Date mask - This specifies the structure of the different dates in the data file. If a year is represented by two digits then an epoch must also be specified.
Ex: yyyy/mm/dd

Epoch - This specifies a two digit integer used to determine a date prefix, so that all two digits dates below the epoch value will be assigned a prefix 20, and all two digit dates above the epoch value will be assigned a prefix 19.
Ex: If the Epoch is set to 80 and the Date is set to 04/05/05, then the software will put 2004/05/05 for the date when doing the importation. The default value is the value from the Management->System Information module.

Time mask - This specifies the structure of the time in the data file.
Ex: hh/mm/ss

5 When all the fields have had a value or a column name assigned and all the options have been set, press on the **Next** button. A window appears.

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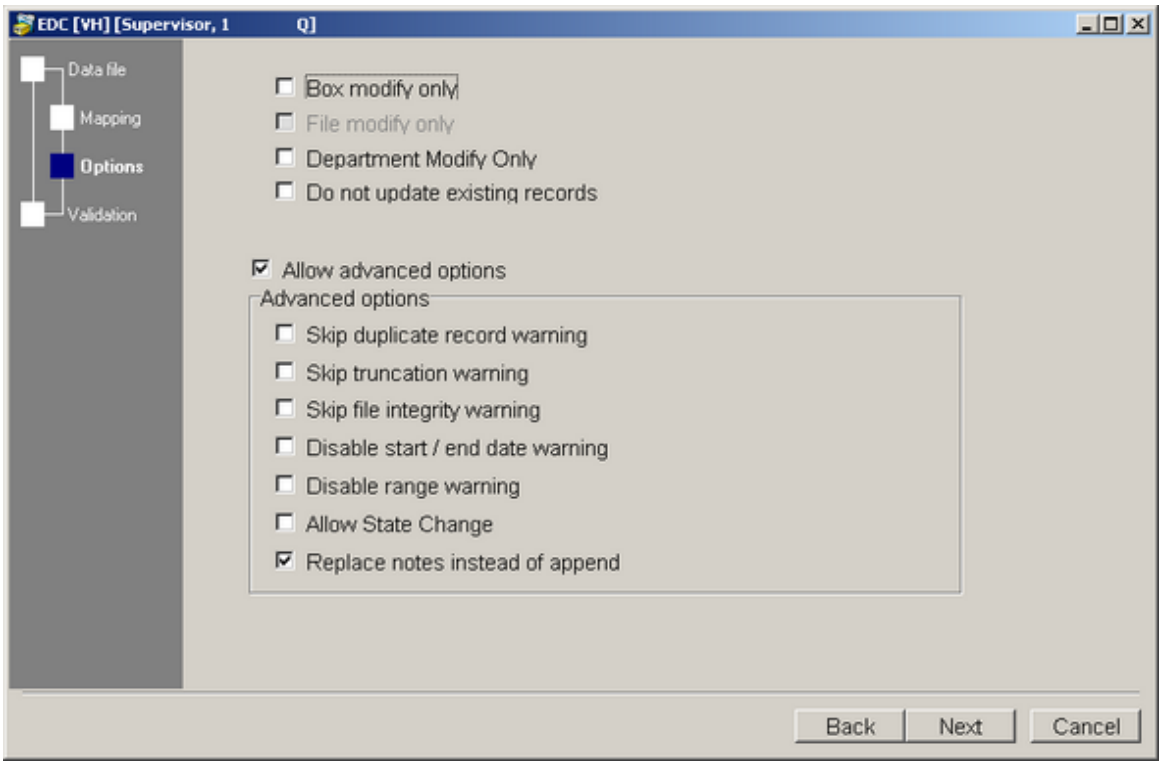

Box modify only - Check box that prevents the addition of new boxes, only the update of the boxes' information already present in EDC will be done. This means that if a box contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Box XYZ for customer DEMO not found, it can't be updated.)

File modify only - Check box that prevents the addition of new files, only the update of the files' information already present in EDC will be done. This means that if a file contained in the data file is not already present in the software, the test and the final import will give an error message (ex: File XYZ for customer DEMO not found, it can't be updated.)

Department modify only - Check box that prevents the addition of new departments, only already created departments should be included in the data file. This means that if a department contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Department XYZ not found.)

Do not update existing records - Check box that prevents existing records from being updated. This is useful if all items in the import should be new.

Allow advanced options - Checkbox that enables the use of the advanced options.

Advanced options

Skip duplicate record warning - When this checkbox is checked, the duplicate record warning will not be included in the error report. This verification is done to prevent the addition of duplicate records in EDC for the same customer.

Skip truncation warning - When this checkbox is checked, the truncation warning will not be

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included in the error report. Normally the truncation message simply indicates that the data imported was too big for the field. The truncated information is simply added to the field and the complete information is included in the notes.

Skip file integrity warning - When this checkbox is checked, warnings about differences in the disposal conditions specified for the boxes and the files that contain them will not be included in the import log.

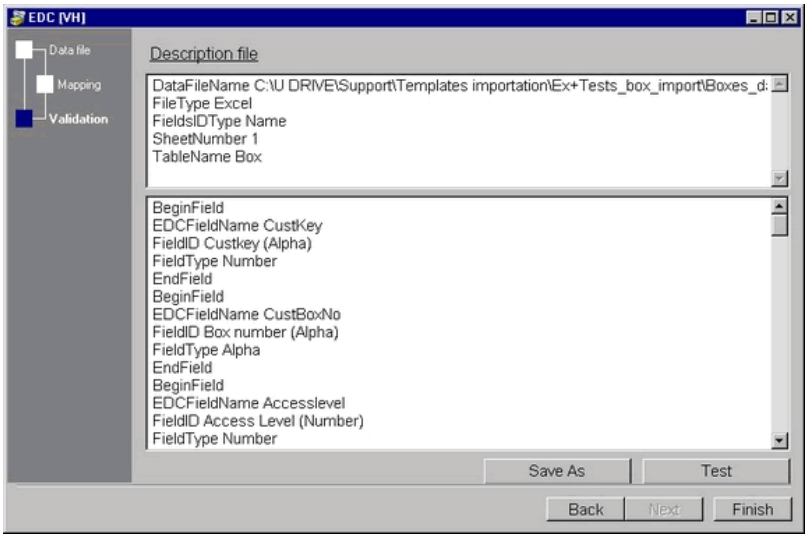
Disable start / end date warning - When this checkbox is checked, the start / end date warning will not be included in the error report. This verification is normally used to make sure the start date is before the end date.

Disable range warning - When this checkbox is checked, the range warning will not be included in the error report. This verification is normally used to make sure that the range interval is valid. A valid range is sequential, meaning that the first value (whether it be a letter or a number) is supposed to be before the second value in the sequence. *Ex:* A comes before Z, thus the range A124 to Z129 would be sequential while the range Z009 to A129 would not.

Allow State change - When this checkbox is checked, the software allows the update of the box or the file's activity, this should be done in exceptional situations. This verification is done so that the state of an item cannot be changed by importing a new activity.

Replace notes instead of append - The default behavior is to add data imported to notes fields to the end of existing notes. If this check box is selected, existing notes will be overwritten.

6 When all the necessary options have been selected, click on the **Next** button. A window appears.



Test - The system will test the description file that has been created (according to the settings of the two previous windows). A report will appear, mentioning if the file contains any errors.

Save as - The system will prompt you to save the description file that has just been created.

7 Press on the **Test** button to make that the settings of the importation are correct. The import log of

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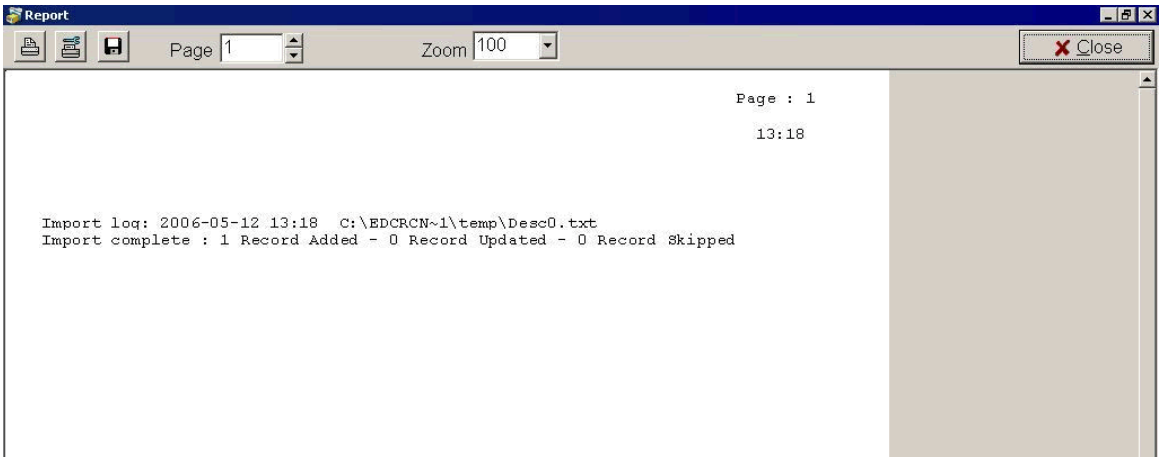
the test appears



Note: The test verifies only the first record of the data file, that is why the test report will only mention "1 record added/updated/skipped".

When reading the import log after a test or after the update, if a word or an expression is unfamiliar, please check the list of terms below for clarifications :

CustBoxNo - Box Number
CustFileNo - File number
FileOwner - File owner
BoxOwner - Box owner
MainDeptName - Department
SubDeptName - Sub department
BarCode - Alternate label
Description - Description
StartDate - Start Date
DocType - Type
UserField1- Field1
UserField2 - Field2
UserField3 - Field3
UserField4 - Field4
UserField5 - Field5
UserField6 - Field6
DestType - Disposal type
DestDate - Disposal date
RangeFrom - Range
RangeTo - Range
EntryDate - Entry Date
Volume - Volume
InVault - Vault
Activity - State
BoxDDNo - Box RC number
EndDate - End Date
SourceLoc - Source
Accesslevel - Access level
OldCustBoxNo - Old box number
OldCustFileNo - Old file number

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Location - Location
Notes1- Notes
Notes2 - Secondary notes

8 When the testing and the mistake correction are complete, press on the **Finish** button. A confirmation message appears, press *Yes* if you want to continue. The system will then prompt you to give your password for confirmation. Enter your password and press **OK**.

9 The importation and/or update of the boxes or files will automatically be done.

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6.5.6.13.3 Check List

This check list will help you make sure that you haven't forgotten anything important during your data importation. Please refer to the previous topic for a detailed step by step procedure 485.

Before the importation

☐ Take note that the disposal type and the disposal date cannot be imported via the import wizard, this will be available in a future version. This information can be imported via the more complex data importation 667.
☐ Make sure that all the values for the *Access Level* field range from 0 to 9.
☐ Make sure that the *Entry Date* field is not blank in the file, since the current date will be entered as default in the field.

****When importing or updating files :**
☐ Make sure that the state of the file corresponds to the state of the box it is imported in (ex: a file should not have the IN state if the box is in the PRE ADD state.)

During the importation

DATA FILE

☐ Make sure that you have chosen the right data file
☐ Make sure that you have entered the delimiter and the separator in the field (only if you are using CSV files). If this is not done, the entire line will appear in your drop-down list.

MAPPING

☐ Make sure the required fields are in the data file (excel or CSV) or that a default value is entered or selected
☐ Make sure all the values are associated to the correct fields
☐ Make sure all the modifications that are specified in the **Options** are correct.

☐ Make sure that the following fields are not put as default :

Box Number (should only be used when doing File import, for files that will go in the same box)
(Box) RC number (should only be used when doing File import, for files that will go in the same box)
(Box)Old number
File Number
(File) RC Number
(File)Old number
Start Date
End Date
Entry Date
Bar code
Notes 1
Notes 2

*****When updating existing boxes :**
☐ Understand that if default values are selected or entered, the software will not update the existing information in this/these field(s).

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☐ When updating boxes in the IN state, make sure not to leave an empty location in your data file because the software will automatically replace the existing location by a default holding location. Make sure to set a bogus default value like XXXXX for the location field.

OPTIONS

When updating existing boxes :
☐ Make sure that either the box modify only and/or the department modify only checkbox are selected in the options.

When updating existing files :
☐ Make sure that either the file modify only and/or the department modify only checkbox are selected in the options.

VALIDATION

☐ In the description file, when the *Customer Key* is taken from the data file :

BeginField
EDCFieldName CustKey
FieldID 2
FieldType ***Number***
EndField

*** Change the *Number* value for *Alpha*. ***

BeginField
EDCFieldName CustKey
FieldID 2
FieldType ***Alpha***
EndField

☐ Test the description file that was created.
☐ Verify the report created and change the necessary information (when the case arises).
☐ Test the description again (if there were errors to correct.)

WARNING

This operation ***cannot be undone***. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

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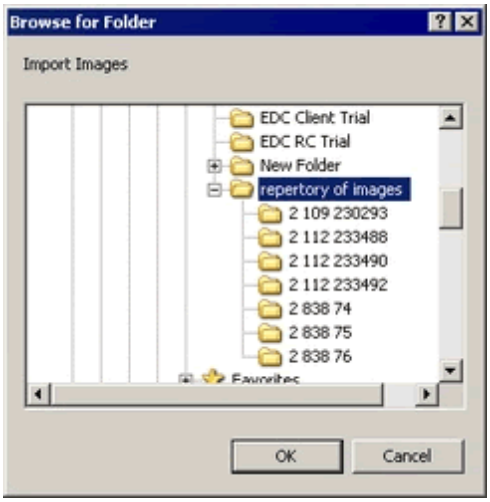
6.5.6.14 Importing images

This is used when many images need to be imported at the same time.

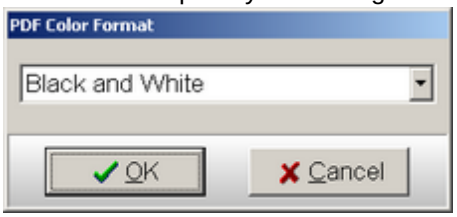
1. Create one or many folders named after the bar codes of the files you want to import images in. Example: one wants to import images for files A61 (bar code: 2 109 1223) and B62 (bar code: 2 109 1225) ; the folder for file A61 will be called "2 109 1223" while the folder for file B62 will be called "2 109 1225".
2. Put all the images you want to import in the appropriate folders. If you need to import many files at a time create a repertory where all the folders will be and select that repertory when it is time to import.

Note : One can only import images in files that are IN or PRE ADD. Not all image formats can be imported into EDC; the accepted formats are: .pdf, .tiff, .tif, or .dcx for multi page formats and . bmp, .pcx, .png, .jpg for single page formats. The name of the images does not have to be specific.

3. Click on **Maintenance->Box and File Maintenance** from the Main window.
4. Click on **File->Import Images**. A window appears (the window is specific to your computer.)



5. Select the repertory containing the folder(s) and press **OK**. A window appears.



6. Select the color format to use for any PDF images documents. Then Click **OK**. (Images imported in color are larger).
7. The images will be imported in the software and an error log will appear if any errors have occurred. The images will be imported in alphabetical or numerical order. The extension ". imported" will be added to images that have been imported to prevent duplication.
8. Repeat the operation if needed.

Note: See knowledge base article KB00145 at client.docudatasoft.com for instructions on using imaging separator pages to scan batches of documents more efficiently using Imaging

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Separator Pages 330.

6.5.6.15 Moving items between regular storage and vault

Customers pay a premium for the storage of their most sensitive material in the vault. Therefore, EDC enforces the storage of boxes and tapes in the type of location that they were marked for. However, sometimes it may be necessary to transfer items into or out of vault storage.

1. Move the boxes or tapes to the new location using the PDT 108.
2. Upload the move list to the **Maintenance->Box and File Maintenance** module, **File->Upload Vault Transfer Move List** menu option.

6.5.6.16 Upload resize move list

This function allows you to change the size of a previously sized box by moving it to a location of the correct size.

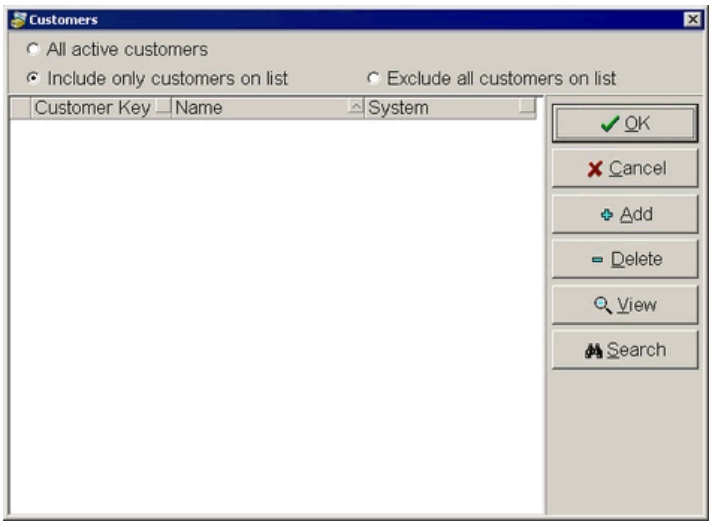
In order to change the size of a box,

1. Perform a move on the PDT 108 to a location of the correct size.
2. Open the **Maintenance->Box and File Maintenance** module.
3. From the menu, select **File->Upload resize move list**.
4. Upload the move list by selecting **2**-Send results->**3**-Move. on the PDT.
5. When the data transfer is done, any errors are displayed.The history and location of the items are automatically updated.

6.5.6.17 Indexing customers

This is used to index the boxes and files of one or many customers at a time, in order for the information about the boxes and files to be available in the *Full Text Search* module. This operation may take a lot of time and may slow down EDC, especially when indexing many customers at a time, so it might be a good idea to perform it during a period of the day that is less active.

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**-> **Index customers.** A window appears.



3 To index all your customers, check off the **All active customers** field and press **OK**.
4 To edit the list of customers:

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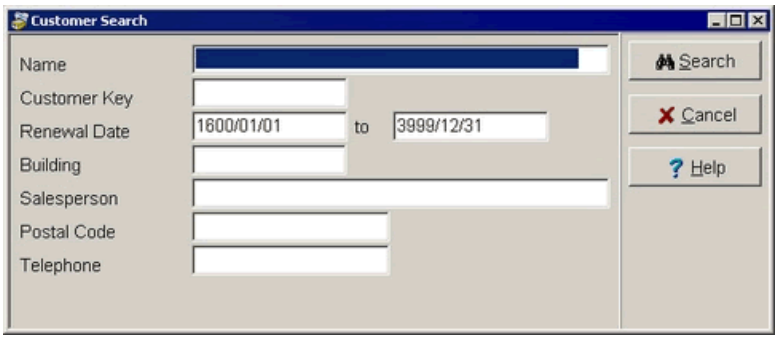
- To add customers to the list, click on the **Add** button. Enter the customer code or press **OK** to have the list of customers (select a customer, it will appear highlighted, and press **OK**.)
- To delete customers from the list, select the desired customer(s) and press on the **Delete** button.
- To view the information of a customer, select the desired customer and press on the **View** button.
- To search for a customer, press on the **Search** button. A window appears



Enter the different search criteria and press on the **Search** button. All the customers that correspond to the entered criteria will automatically appear on the list.

5 To index only the customers on the list, check off the **Include only customers on list** field and press **OK**.
6 To index only the customers on the list, check off the **Exclude only customers on list** field and press **OK**.

6.5.6.18 Viewing the replication log

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Replication log**
3 The report will automatically be displayed on the screen

6.5.6.19 Viewing the replication times

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Replication Times**
3 The report will automatically be displayed on the screen

6.5.6.20 Recover boxes or files from backup

Although precautions are taken to prevent it, problems such as hardware failure, network problems, or viruses may cause file data to become corrupt. This operation allows you to recover file data from a back-up of your EDC database, without losing all the work that was done (such as the processing of new orders) since the back-up.

1. From the **Maintenance->Box and File Maintenance** module, select **Edit->Recover boxes| files from back-up**.
2. In the window that appears, browse to the Folder.Dat file of the back-up for files or Box.Dat for boxes. (This may be in a folder such as EDCRC\data\)
3. Select it and click **Open**.
4. EDC will compare the existing files to the back-up and recover any files that have become corrupt. If no files have changed, the following message will appear:

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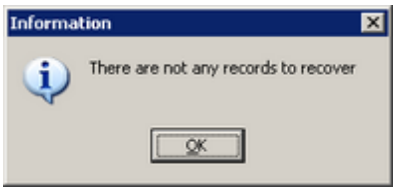
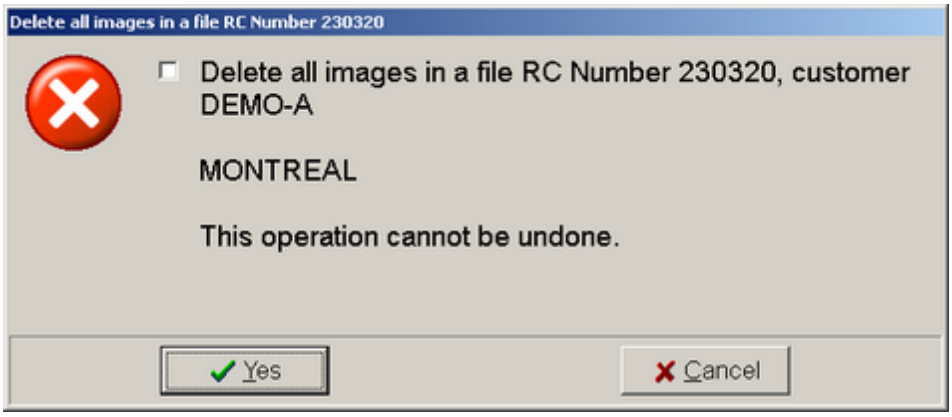


6.5.6.21 Deleting all images in a file

Once saved, images become permanent until the associated file is destroyed. If it is necessary to delete all images for a file, it may be done as follows.

(If it is necessary to keep some of the images from a file, these can be exported **prior to deletion**, then re-imported.)

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **Edit->Delete all images in a file**.
3. A message "*Delete all images in a file ? This operation cannot be undone.*" appears. Click **Yes** to proceed.
4. A "*Customer*" prompt appears. Enter the **customer key** and click **OK**, or click OK and select the customer from a list.
5. A "*File RC*" prompt appears. Enter the RC Number[732] of the file and click **OK**. A warning appears.


Delete all images in a file RC Number 230320
Delete all images in a file RC Number 230320, customer DEMO-A
MONTREAL
This operation cannot be undone.
Yes
Cancel

6. Confirm that the file RC Number, the customer, and the file name are all correct. If they are, **check the checkbox** and click to proceed.
7. A "*Password*" prompt appears. Enter your password and click "**OK**".

The images will be permanently deleted, and the history item "ALL IMAGES DELETE", with the user who deleted them, will appear in the file history.

Note: If the customer uses *ActiveFile* and has their data replicated, this operation can only be performed by a supervisor user through the *ActiveFile* software.

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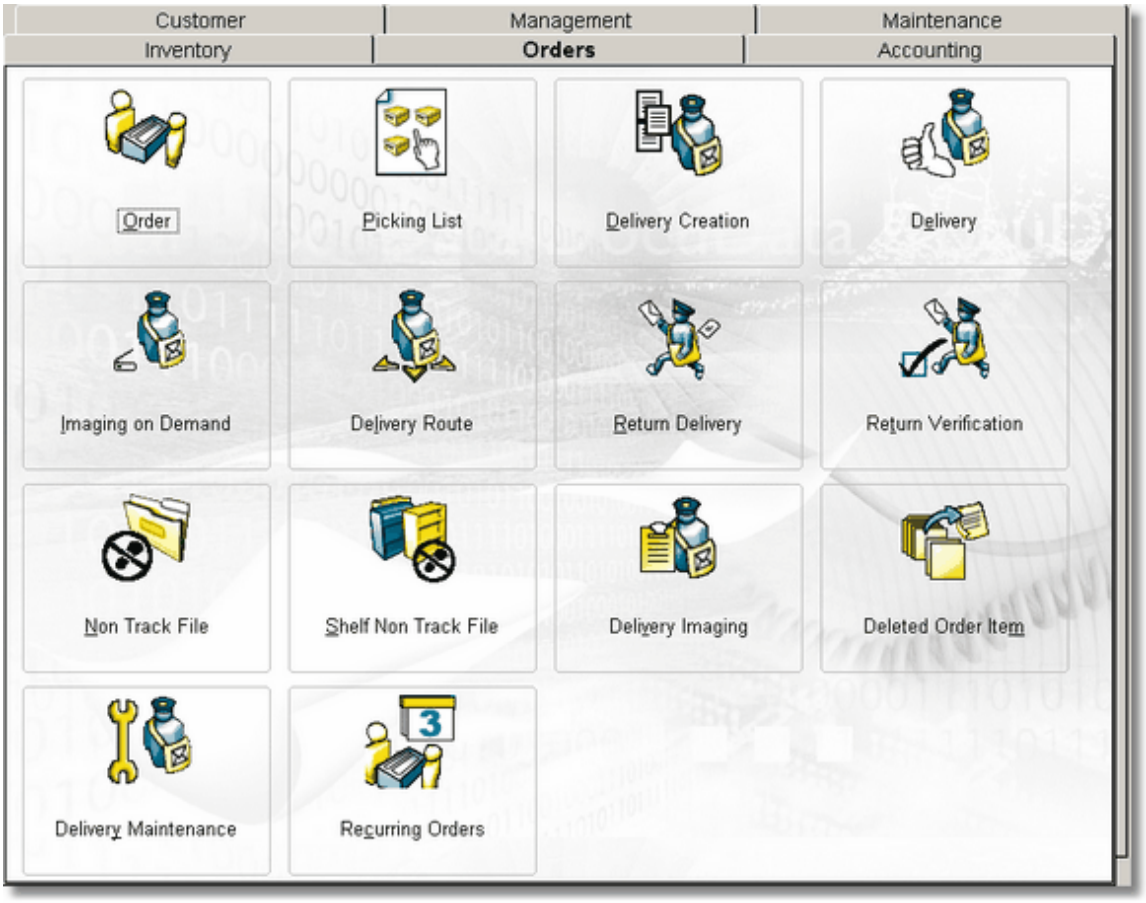
6.6 Orders (Orders tab)

6.6.1 Outline (Orders)

For efficiency and security, order processing passes systematically through distinct steps.

1. Orders are entered into the system
2. Orders items are picked
3. Items are grouped into deliveries
4. Deliveries are grouped into routes
5. Deliveries are validated
6. Deliveries are delivered
7. Deliveries are returned
8. Return items are re-filed and verified

The organization of the Orders tab reflects this process.



Modules

- Order 501
- Picking List 526
- Delivery Creation 532
- Delivery 534
- Imaging on Demand 539
- Delivery Route 543

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- Return Delivery 548
- Return Verification 561
- Non Track File) 564
- Shelf Non Track File 566
- Delivery Imaging 567
- Deleted Order Item 573
- Delivery Maintenance 575
- Recurring Orders 583

Related topic
- Working with the PDT 104 (portable data terminal)

6.6.2 Order

6.6.2.1 Overview (Order)

This module is used to create, edit or delete an order. It is also used to consult existing orders.

Available reports
- list of orders that are not closed
- list of all orders, either by date or by customer
- picking list of items for the current order
- list of charges for the current order
- list of authorized users for the selected customer)

Fields 503 **(see the next section)**

Tasks
- Entering an order 504
- Entering a purchase order 505
- Entering a fast order 506
- Picking and delivering an order immediately 508
- Adding items to an order that is being created 509
- Adding special instructions to an order 520
- Editing an order 521
- Deleting an order 523
- Printing thermal labels for boxes and files 524
- Viewing some information about the current order 524
- Viewing or printing some reports 525

Distinctive menu options:

File menu
- Create order 504
- Purchase order 505
- Terminate order 504
- Edit order 521
- Delete order 523
- View picking list 524

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- Print thermal labels 524
- View orders->Not closed | By date 525
- Print orders->Not closed | By date 525
- Pick and run 508
- Fast box order 506

View menu
- Delivery address 524
- Special instructions 520
- Order charges 524
- Purchase order 524
- Authorized users 524
- Ordering notes 524

Edit menu
- Delivery address 521
- Special instructions 520
- Order charges 521
- Purchase order 521

Item menu
- Add item 509
  - Box retrieval
  - File retrieval
  - Box sale
  - Returns/pickups
  - Line items
  - Shredding container/bag rotation
  - Shredding container/bag delivery
  - Shredding container/bad return
  - Shredding container emptying
  - Box search
  - File search
  - Import from text file
  - Add to order from list
- Edit item 521
- Edit charge backs 521
- Edit Perm Outs 522
- Delete items 521
- View items 524

Module window:

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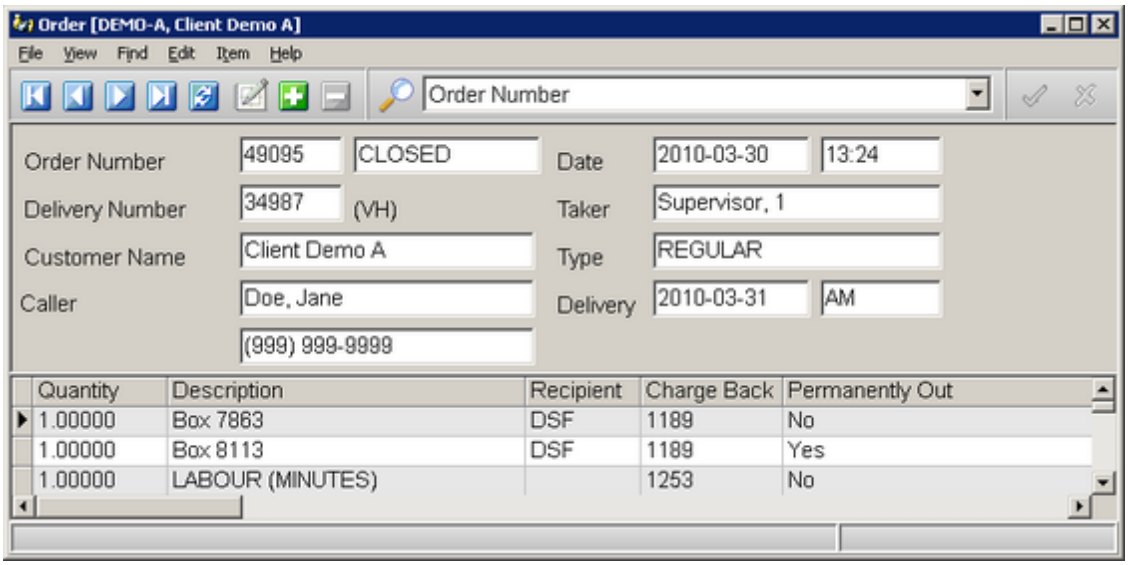
Order [DEMO-A, Client Demo A]
File View Find Edit Item Help
Order Number
Order Number 49095 CLOSED Date 2010-03-30 13:24
Delivery Number 34987 (VH) Taker Supervisor, 1
Customer Name Client Demo A Type REGULAR
Caller Doe, Jane Delivery 2010-03-31 AM
(999) 999-9999
Quantity Description Recipient Charge Back Permanently Out
1.00000 Box 7863 DSF 1189 No
1.00000 Box 8113 DSF 1189 Yes
1.00000 LABOUR (MINUTES) 1253 No

6.6.2.2 Fields (Order)

Order Number
This field indicates the order number at the record center and the status of the order. The status is indefinite when the order is being created. After having been accepted, the status will become "grouped" and "closed", according to which step of the process the order is at.

Delivery Number/Building Code
Indicates the delivery number and the code of the building associated to the order. The delivery number only appears when the order has been grouped.

Customer Name
Name of the customer (company or individual) for which the order is placed.

Caller
Indicates the customer's user who called the record center to place the order and the phone number where he can be reached.

Date
Date and time when the order was accepted.

Taker
This field can contain the name of the employee that created the order in the software. It can also mention 'Order Server' if the order was created via ***EDC ActiveFile Software*** or 'EDCWeb' if the order was created via the web interface of EDC.

Type
Method and delay for the delivery. The delays are established by the record center and determine when the items are delivered.

Delivery date
This field indicates the date and time (AM or PM) of the delivery. It will remain empty until the order is accepted.

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Order item columns:

Quantity
Quantity of each item that was ordered.

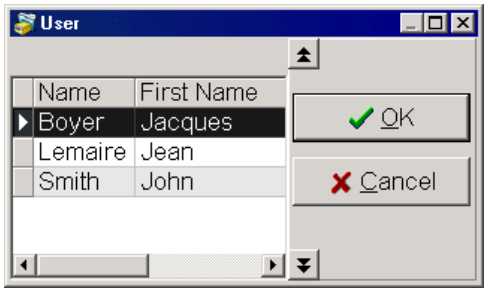
Description
Description of each ordered item. It contains the customer box number, Field 1 and the description of the box|file.

Recipient
Name of the person to whom the item has to be delivered to. Several recipients can be present on a same order.

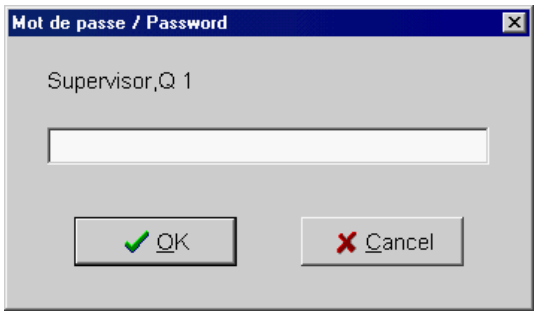
Charge Back
It is the charge code attached to the item. Sometimes it will be a department name. This will depend on the customer's billing parameters that are set in the *Customer Information* module. Several charge back (or department) can be present on a same order.

6.6.2.3 Entering an order

1. Open the **Orders->Order** module
2. Click on **File->Create Order**, or press the **Insert** key. A window appears and asks for a customer code.
3. Enter the code of the desired customer and press **OK**. A window pops-up if the customer has any ordering notes, press **OK**. A window appears.



4. Select a user and press **OK**. A window opens on the screen.



Note : This window is displayed only when the user has an assigned password (settings of the Customer Information 223 and Authorized User 280 modules).

5. Enter the user's password and press **OK**. A window appears listing Delivery Addresses 302 that the authorized user has access to.

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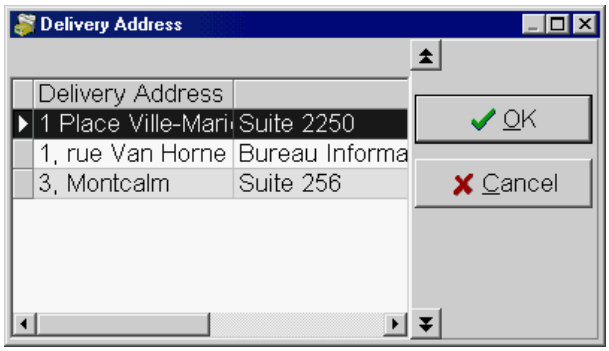
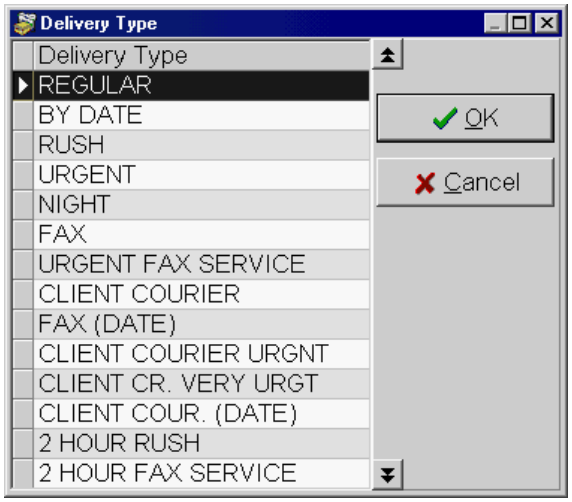


6 Select a delivery address and press **OK**. A window is displayed with delivery types 621 that the authorized user has access to.



6. Select a delivery type for the order and press **OK**.
7. Menu options for adding items to the order become available.
8. Add the desired items (see "Adding items to an order 509" for more details)
9. Click on the **Accept** button to *terminate* entry for this order. This is equivalent to selecting **File->Terminate order**, or pressing **Ctrl-Enter** on the keyboard.

Note: When order entry is terminated, EDC RC assigns the order an order time and delivery date, and the items appear on the picking list for that delivery period. Terminating the order before the picking cut-off is therefore very important.

6.6.2.4 Entering a purchase order

A purchase order is solely used when a customer buys services or cardboard boxes without retrieving or searching for boxes or files.

1 Click on **Orders->Order** from the *Main window*.
2 Click on **File->Purchase Order**. A window appears.
3 Enter the code of the desired customer (to have the list of customers press **OK** --- select a customer and it will appear highlighted) and press **OK**. A window appears.

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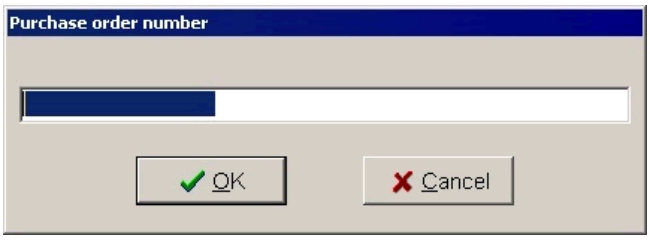


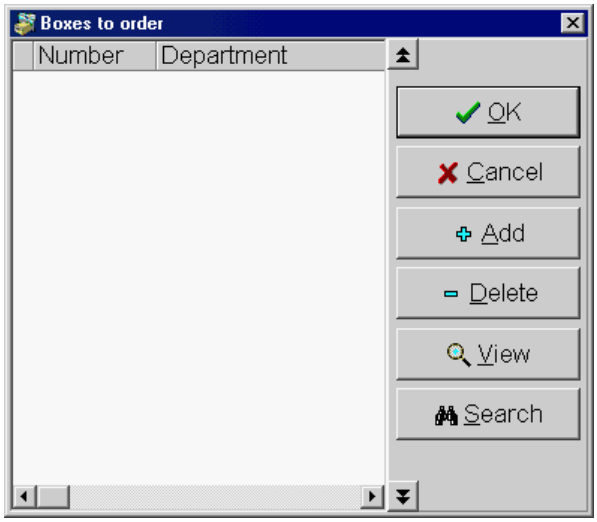
4 Create a number for your order. Press **OK**
5 Select a delivery address in the list (it will appear highlighted) and press **OK**.
6 Select a delivery type in the list (it will appear highlighted) and press **OK**.
7 Add the desired items (see "Adding items to an order 509" for more details) and click on the **Accept** button to terminate the order.

Note: The purchase order only includes box sales and line items, so it is normal not to have access to the rest of the items.

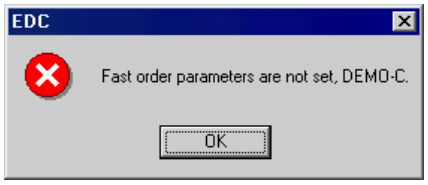
6.6.2.5 Entering a fast order

A fast order is a special kind of order for which parameters have to be pre-defined in the *Customer Information* module (See Using the Pick and run and the Fast order options 133). Only the ordered boxes have to be selected and the recipient has to be confirmed, so that these orders can be placed easily.

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Fast Box Order**. A dialog box appears.
3 Enter the desired customer key and press **OK**. A window opens.



Note : If the parameters for fast orders have not been set for the customer, a message appears.



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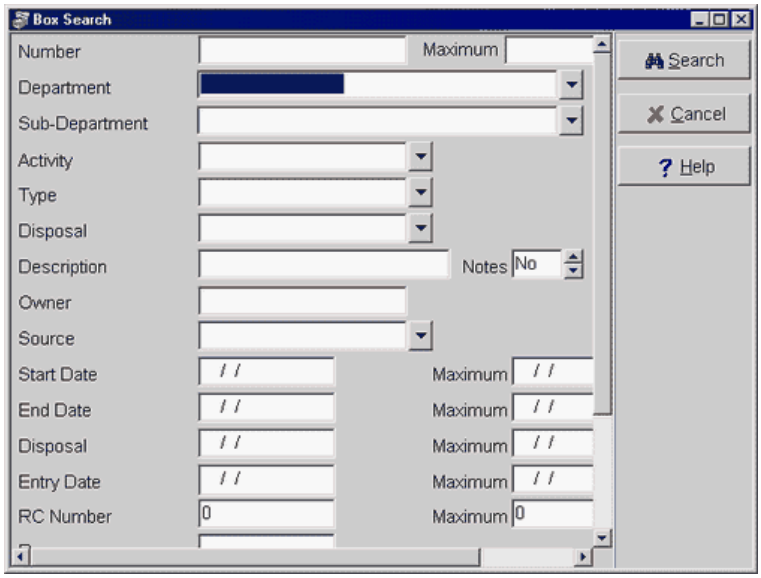
Press **OK**, get out of the *Order* module, open the *Customer Information* module and set the appropriate field (see the description of the fields for fast orders 225 in the *Customer Information* module).

4 Perform one of these operations :

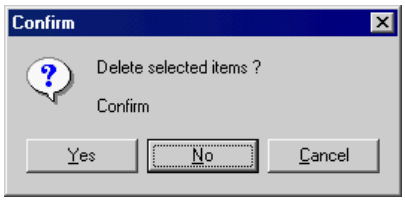
To add boxes to the order, click on the **Add** button. A window appears.
Enter a box number to indicate where to start in the selection list and press **OK**. A list of the inventoried boxes for that customer appears. Select the desired boxes and press **OK**. The window for box order opened in **3** reappears, and displays all the boxes selected here.

- To add items to the order by performing a search, click on the **Search** button. A window appears.



  Enter the desired search criteria and click on the **Search** button (see "Searching for boxes and files 350"). The system will find all the boxes that correspond to the search criteria and will automatically add them to the order if they are IN.

- To remove items, select them and click on the **Delete** button. A dialog box appears.



  Click on the **Yes** button to confirm the deletion. The items in question will not be ordered.

5 Click on the **Cancel** button of the window opened in **4** to accept the order. A window appears.

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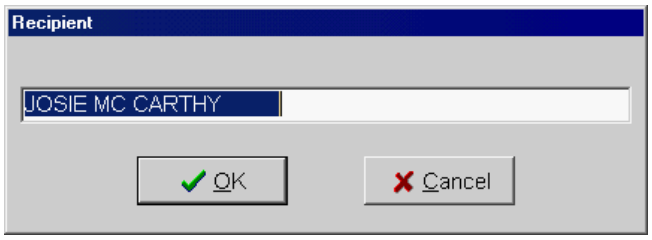


6 Press **OK** to confirm that this person will receive the boxes or enter any other name. When the case arises, a report's window appears and indicates all the boxes that were rejected from the order (boxes OUT, in PRE ADD, etc).
7 After going through the list of reasons the system rejected some boxes, click on the **Close** button. A dialog box appears and asks to "prepare the portable data terminal for the data transfer".
8 Prepare the PDT 732 to receive the data and click on the **OK** button. The data are automatically transmitted and downloaded to the PDT, so that the boxes can be picked at their locations. The status of the order becomes GROUPED.

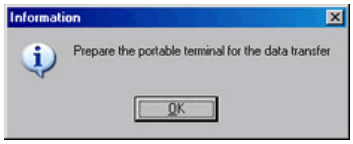
Note : The fast orders are identified by a small icon located under the *Caller* field.

9 After the fast order has been picked, click on **File**->**Upload Fast Order** in order to upload from the PDT the picking results. This will start the printing of two copies of the delivery slip. Or go in the *Delivery Verification* module and click on **File**->**Upload Fast Order**.

6.6.2.6 Picking and delivering an order immediately

This operation allows to pick an order individually and to deliver its items immediately by downloading them on a PDT. (See Using the Pick and run and the Fast order options 133.)

1 Click on **Orders**->**Order** from the *Main window*.
2 Keep the desired order on the screen and click on **File**->**Pick and Run**. A dialog box appears.



3 Prepare the PDT to receive the data and click on the **OK** button. The picking list is automatically downloaded to the PDT and a delivery is created for the order that becomes GROUPED.

Note : If a delivery has already been created for the order, the delivery must only include the current order, otherwise an error message will be displayed.

4 Proceed to the picking of the items with the PDT (see the section "Picking items with the PDT 133") and upload the picking results by clicking on **File**->**Upload Fast Order** (option also available in the *Delivery Verification* module). When results have been uploaded, a dialog box appears.

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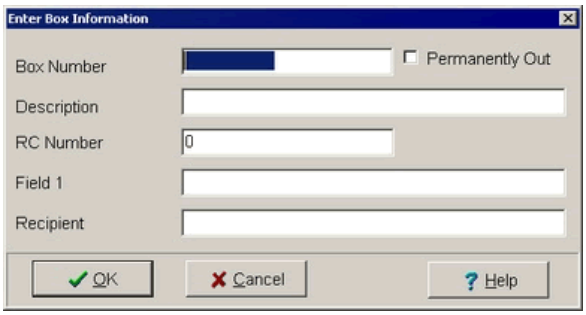
5 Click on the **Yes** button to print the delivery slip or click on the **No** button to do not print it. The order is automatically marked as CLOSED.

6.6.2.7 Adding items to an order

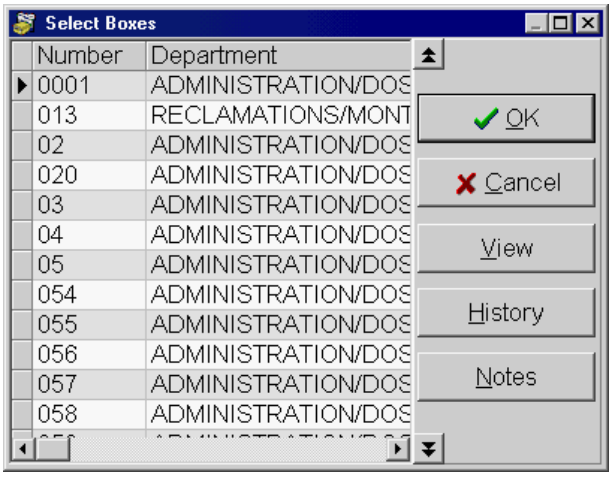
To create an order, follow the steps in the section, "Placing an order" 504. Once an order has been created, you may add one or more items to the order.

Adding a box retrieval

1. Click on **Item->Add Item->Box Retrieval**. A window appears.



2. Enter a recipient (required). Enter value for the box number, description, RC number, or Field 1, and press **OK**. A list of boxes will appear, positioned to the specified value, sorted by the specified field.



3. Highlight the desired boxes and click on the **OK** button.

Adding a file to an order

1. Click on Item->Add Item->File Retrieval. A window appears.

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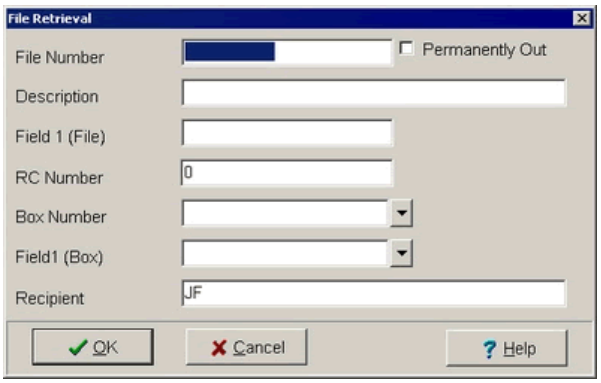


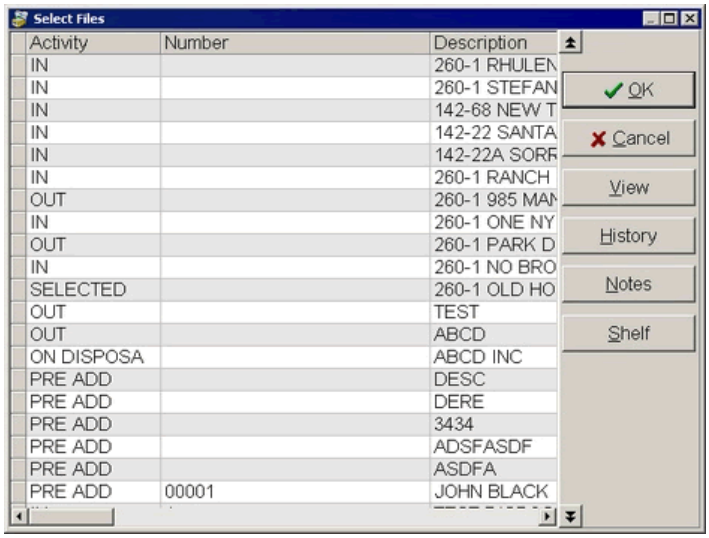
2. Enter a recipient
3. Specify the file

By File RC number:

- If have the file RC number is known, enter it and click **OK** to add it to the order.

By file number or description:

- If the file number or description is know, enter that information and click **OK**. A list of inventoried files appears. Highlight one or more files and click **OK**. They will be added to the order.



- If the file is stored open shelf and is not inventoried, click on the **Shelf** button. A window appears with criteria for specifying open shelf files.

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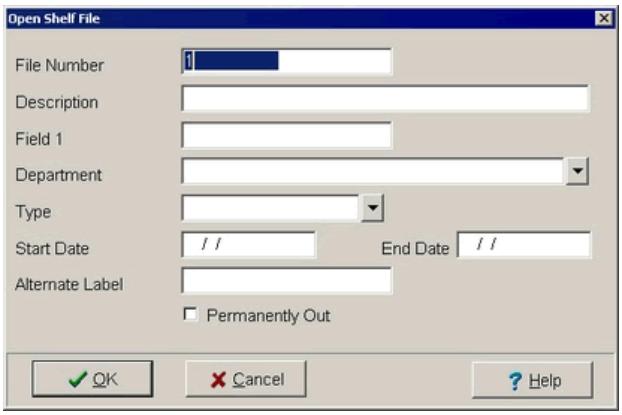
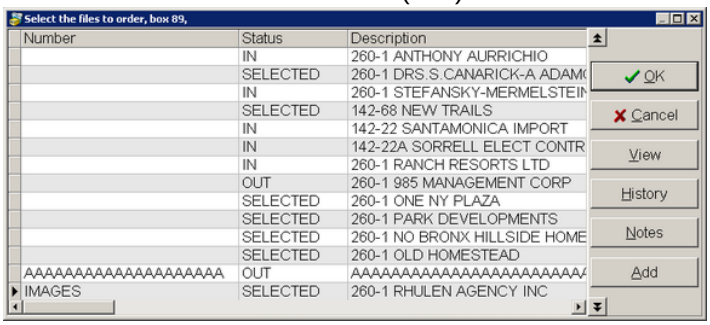


1. Enter the desired information in the appropriate fields (one must enter at least the department and the type of the file) and press **OK**. The file is added to the order as an auto-inventoried file[727]. You are returned to the list of files, with the added file selected.
2. Click **OK** to add the file to the order.

By box:

- Enter the box number or Field 1 (Box) and click **OK**. A list of files in that box appears.



- If the file exists, highlight the file and click **OK**.
- If the file has not been inventoried but the customer wishes for you to search in the box, click the **Add** button to create an auto-inventoried file[727]. In the window that appears, enter the file number, description, and/or field 1, then click **Ok**.
- You are returned to the list of files in the box, with the new file selected. Click **Ok** to add the file to the order.

Note: Because several files can have the same number and description, click on the View button to open the detailed report and see the RC number, in order to be sure that the right file is ordered.

Note: Auto inventoried files in boxes can only be added to an order if the box has been specified.

Adding a quantity of return items

1. Click on **Item->Add Item->Returns->Not Specified**. A window appears.

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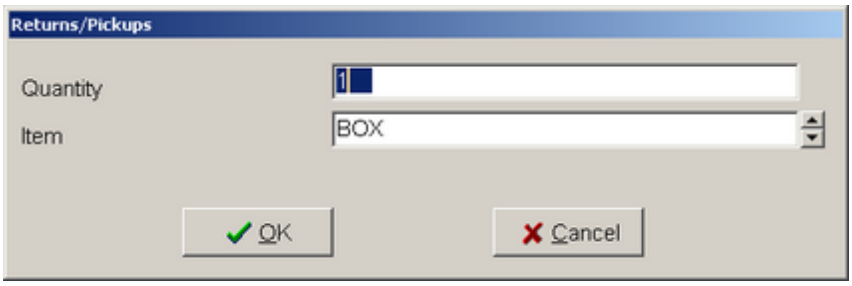


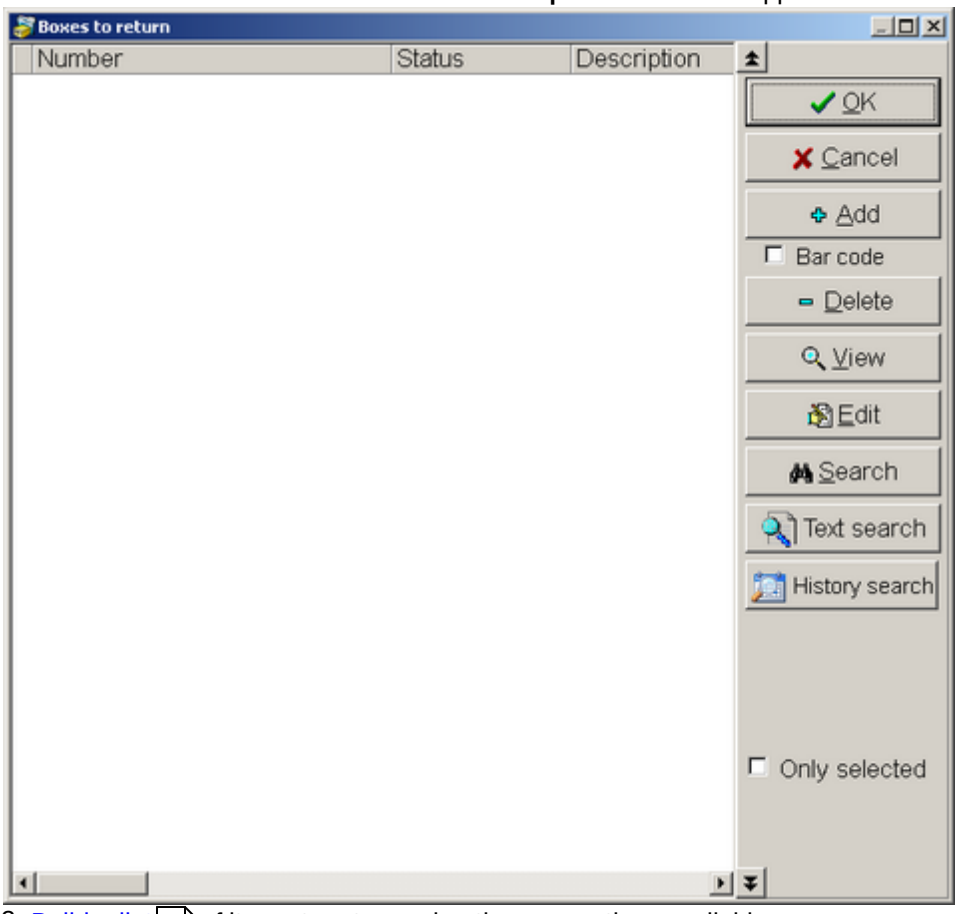
2. Enter the quantity of return items, select whether the items are Boxes, Files, or Tapes, and press **OK**.

Note : This quantity of returning items appears on the delivery slip for reference in planning and performing the delivery. For return courier, the actual quantity billed is taken from the quantity entered or scanned on the return delivery.

***Adding a return of specific boxes or files**

This option need only be used if a customer wants to ensure that specific items are picked up. It is easier to use non-specified returns.

1. Click on **Item->Add Item->Returns->Boxes|Files**. A window appears.



2. Build a list 356 of items to return using the may options available.
3. Press **OK** to complete the operation.

Note : Specified returns are listed on the delivery slip. If the delivery is performed with the

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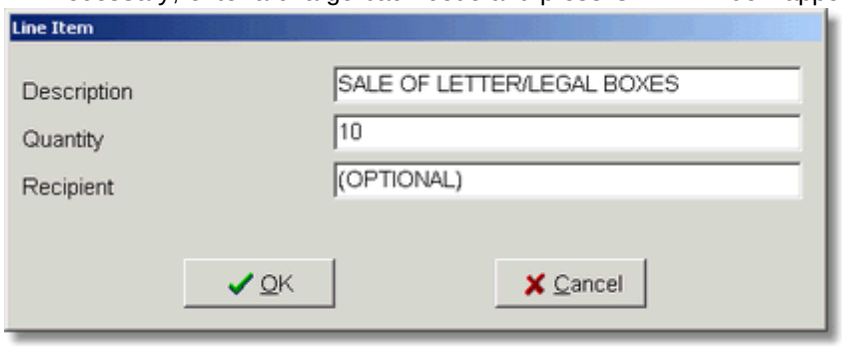
PDT, the PDT will prompt the driver for each item to be picked up. (It is not necessary to scan boxes in the order prompted.) If items were not picked up, a report will of missing items will appear upon returning the delivery. It is still possible to mark the return as complete, but missing items will be added to the process errors report 582. (see Reconciling process errors 576).

Adding a cardboard box sale

1. Click on **Item->Add Item->Box Sale**. When the customer is billed by charge back a window appears.
2. If necessary, enter a charge back code and press **OK**. A window appears.

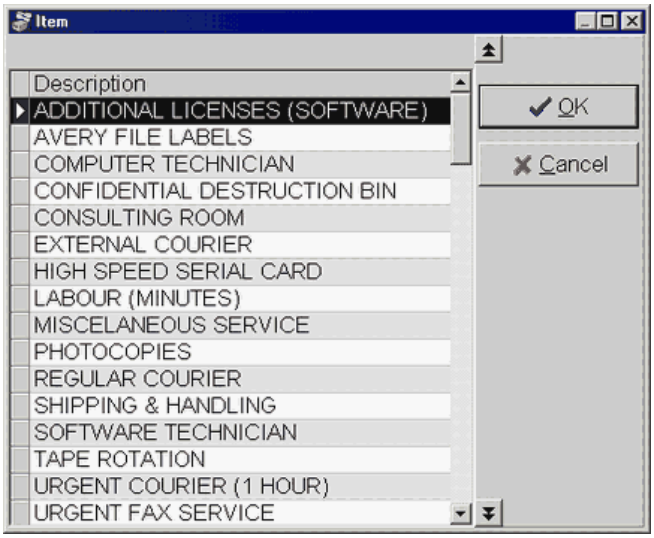


Note : The system displays by default the quantity entered in the Order Minimum field of the General Pricing module for the box sale items. No quantity of box sale less than this one can be ordered.

Adding products or services to an order as Line items

A record center can make any product or service available for order as a line item 637, which might or might not be billed. Common examples include bar code labels, non-standard size boxes, and various service charges. To be included on that list, the *Line Item* and *Order Entry* fields of the item in question must be set to "Yes" in the General Pricing module.

1. Click on **Item->Add Item->Line Item**. A list of line items appears.



2. Highlight an item and press **OK**.
3. Depending on the customer billing options, you may be prompted to select a department or charge back code. If so, elect the appropriate one and press **OK**. A window appears.

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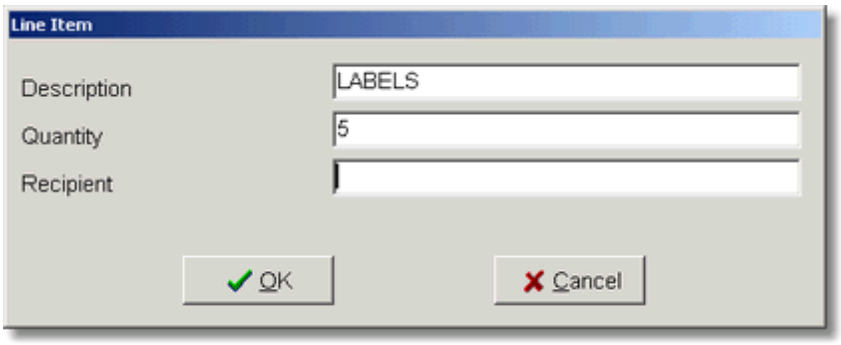


4. Enter the desired quantity, and optionally the recipient, and press **OK**.

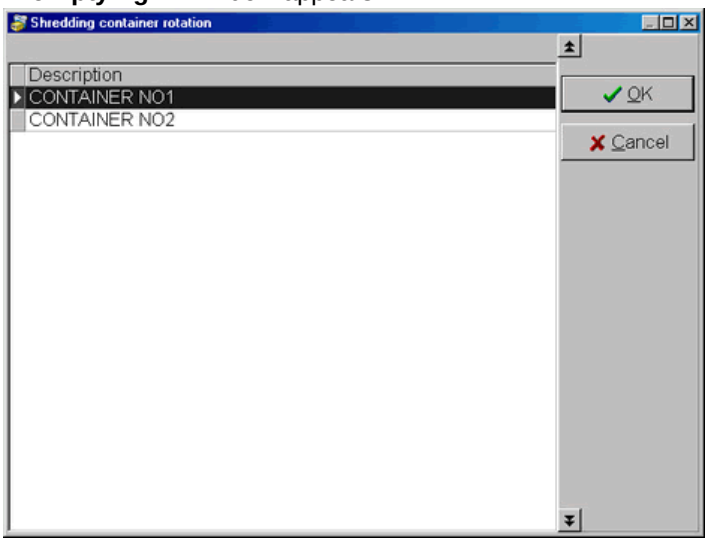
Adding shredding-related services to an order

Four shredding-related order options exist.

Operation	Containers	
	To customer	From customer
Shredding container rotation	1	1
Shredding container delivery	1	0
Shredding container return	0	1
Shredding container emptying	0	0

To add one of these services to an order:

1. Click on **Item->Add Item->Shredding container/bag rotation | delivery | pick up | emptying.** A window appears.



2. Highlight the type of container to be processed, then press **OK**.
3. The item will be added to the order.

Note: The container type must be made available to the customer 88 before it can be ordered. Shredding container delivery and return order items can be placed through *EDC RC* but not over the web, since they are typically associated with contract modifications.

[****]

Adding a box from a search

You may also create a list of boxes or files to order using The box and file searches behave as

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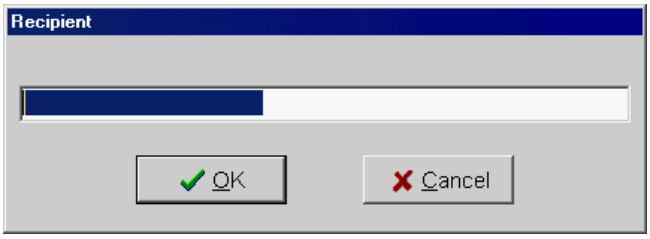
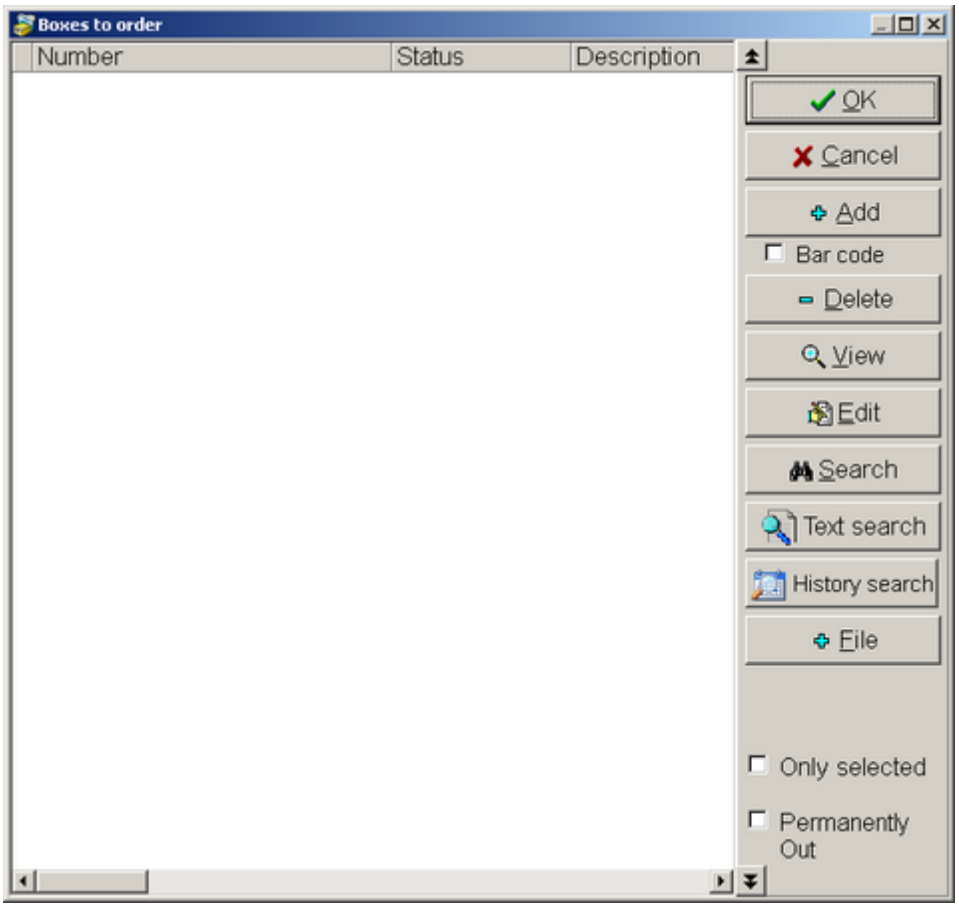
the , contrary to a simple search, adds items to the order.

1 Click on Item->Add Item->Box Search. A window appears.



2 Enter the recipient and press OK. When the customer is billed by charge back a window appears.
3 When necessary, enter a charge back code and press OK. A window appears.



4 Perform one of the following operations :

- To manually add boxes, click on the Add button and enter a number in the window that is displayed. The list of the boxes or files for the customer appears. Select the desired items and press OK. The items are added to the selection and are displayed in the window opened in 3.
- To edit the information of a record, select a record (it will appear highlighted) and click on

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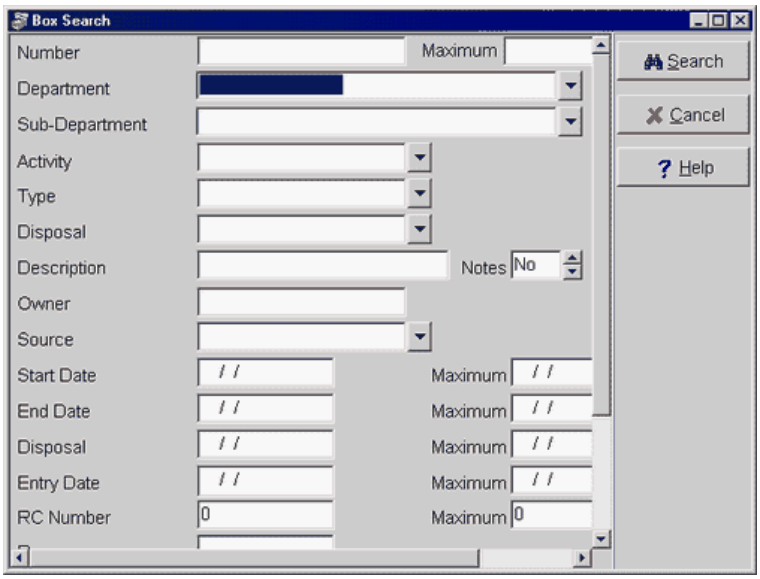
the Edit button.

Note : By selecting a box in the ones that are added to the order and by clicking on the File button, it is possible to enter a description for a file contained in that box; this will indicate to the system not to order the entire box but only the file.

- To add items by performing a search, click on the Search button. A window appears.



Enter one or more search criteria and click on the Search button. All the boxes that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in 3.

- To remove an item from the selection, select it and click on the Delete button.
- To include only certain boxes from the list: select the boxes and files you want to add and check the field called "Only Selected".
- If the boxes are to be permanently removed from storage, check the field called "Permanently Out".

5 Click on the Accept button to confirm the addition of all the items to the order. The available boxes and files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

*__Adding a file from a search__

The file search, contrary to a simple search, adds items to the order.

1 Click on Item->Add Item->File Search. A window appears.

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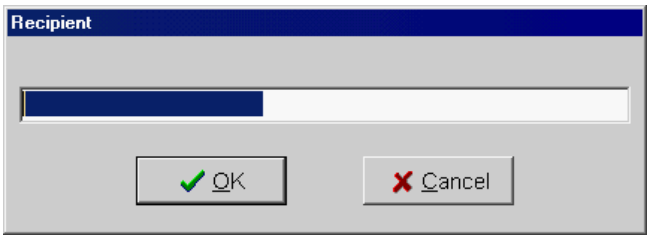
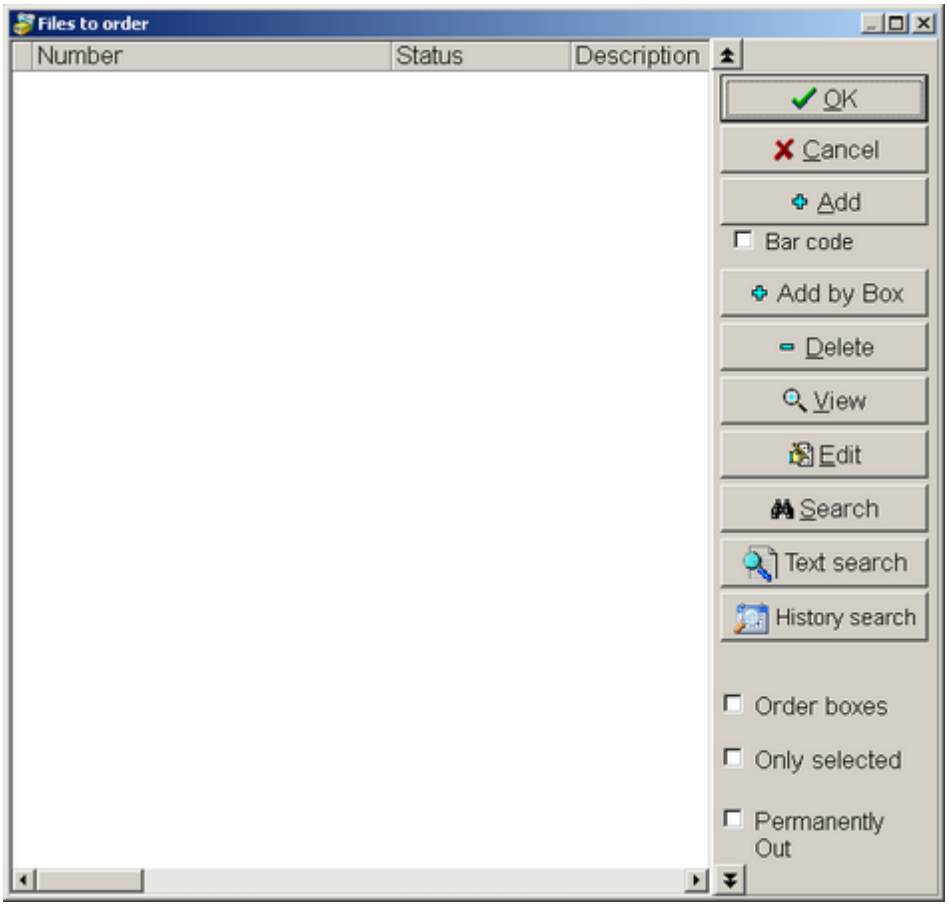


2 Enter the recipient and press OK. When the customer is billed by charge back a window appears.
3 When necessary, enter a charge back code and press OK. A window appears.



4 Perform one of the following operations :

- To manually add files, click on the Add button and enter a number or a description in the window that is displayed. The list of the customer's files appears. Select the desired items and press OK. The items are added to the selection and are displayed in the window opened in 3.
- To edit the information of a record, select a record (it will appear highlighted) and click on the Edit button.
- To add many files from the same box, click on the Add by Box button. A window appears.

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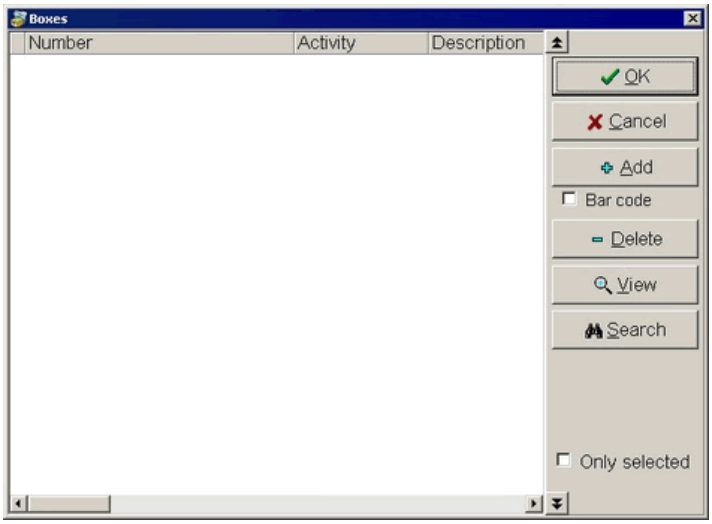
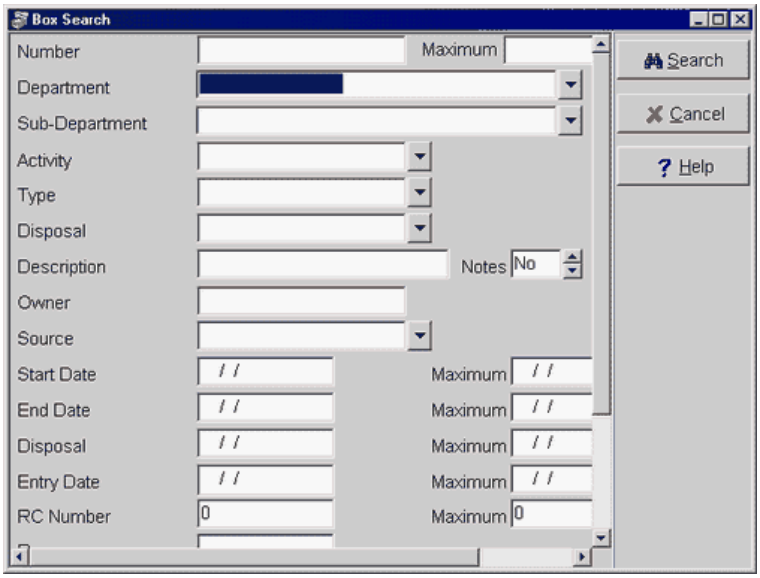


Click on the Add button, and enter a box number. The list of the customer's boxes appears. Select one or many boxes (they will appear highlighted) and press OK. Press OK in the Boxes window when all the boxes where added. All the files from the boxes selected appear in the Files to order window.

- To add items by performing a search, click on the Search button. A window appears.



Enter one or more search criteria and click on the Search button. All the boxes and files that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in 3.

- To remove an item from the selection, select it and click on the Delete button.
- To include only certain boxes or files from the list: select the boxes and files you want to add and check the field called "Only Selected".
- To add only the boxes to the order instead of all the files, check the field called "Order boxes".
- If the files are to be permanently removed from storage, check the "Permanently Out"

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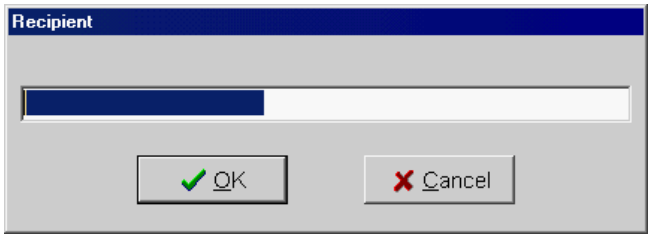
checkbox.

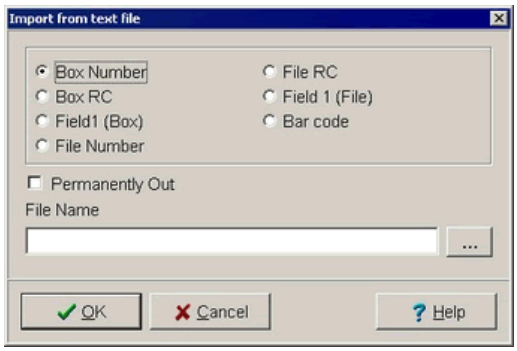
5 Click on the Accept button to confirm the addition of all the items to the order. The available files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

Adding an item (or return item) by text file importation

1 To add items click on Item->Add Item->Import from text file. (To add return times, Click Item->Add Item->Returns/Pickups->Import returns from text file.) A window appears.



2 For returns enter a recipient and press **OK.** (If the customer uses charge back billing 227, you will also be prompted for a Charge Back code.) A window appears.



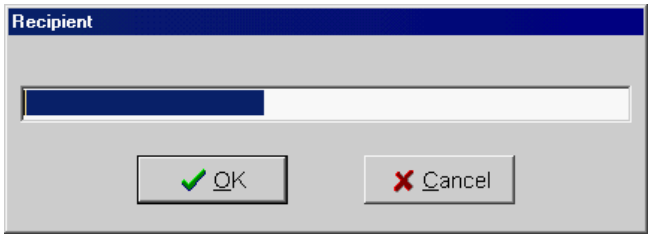
3 According to the document type that is ordered, check off the related options. Example: if you want to look for a file you might want to look for it either by RC number, by name or by number.

4 Enter a text file name or scroll the directories to find the right text file and press OK.

Note : Files for import must be text files, containing a column of data of the type specified - in this case, box numbers.

Adding an item by list importation

1 Click on Item->Add Item->Add to Order from List. A window appears.



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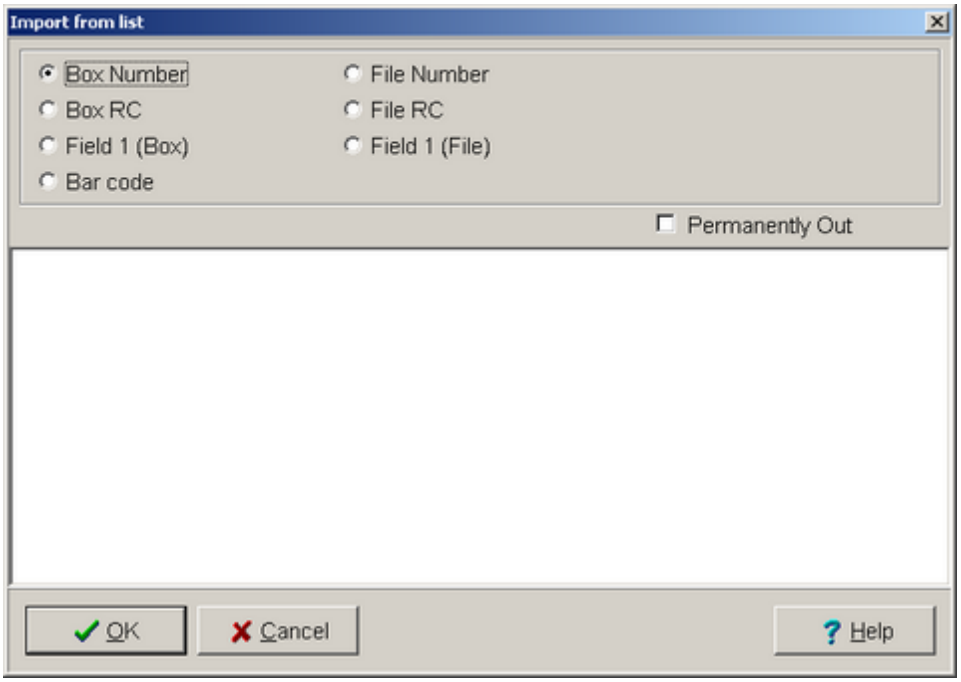
2 Enter a recipient and press **OK**. (If the customer uses charge back billing[227], you will also be prompted for a Charge Back code.)
A window appears.



3 According to the document type that is ordered, check off the related options and write the information in the empty field at the bottom and press OK. Example: if you want to look for a file you would check off the File RC number option at the top and write the number in the empty field.
4 The software will automatically add the item(s). If the software does not find the information an error message will appear.

Adding items of an item set

In the Box and File modules, a field named Item Set[311] allows to associate any inventoried item to an item set. Consequently, when an item of an item set is ordered, all the items granted to that item set are automatically added to the order. If the user wants to exclude some of the items that were added automatically to the order, he just has to remove them manually before accepting the order.
To order items of an item set: simply order any item as usual, like boxes (or tapes), files, non-track files, etc (see previous operations). The system automatically sorts the other items of the item set and displays a message to indicate if some of these items are not available.

6.6.2.8 Adding special instructions to an order

The special instructions for an order are displayed on the delivery slip, and also on the paper picking list (if this option[198] is set to **yes** in the system information module).

The order is being created and the steps **1** to **6** of the section "Placing an order"[504] have already been performed. Special instructions can now be added to the order.

1 Click on **Edit**->**Special Instructions**. A report's window appears.

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2 Enter the desired special instructions and press **OK**.
3 Repeat the operation later if the instructions have to be modified before accepting the order.

Note: It is important that the order is being created. If the order is already accepted, the special instructions will not appear on the picking list or the delivery slip; it depends on the status of the order (see "Editing an order 521").

6.6.2.9 Editing an order

An order can be modified after having been accepted, but the delivery time may be affected (the choice is possible) and have a direct occurrence on the delivery date. Furthermore, the modifications that can be done depend on the order status when proceeding.

For all the operations described below, consider that an order has been created, accepted and is still on the screen.

The order is picked or being picked

Available operations :

- Editing the delivery address
- Editing special instructions
- Editing delivery type
- Editing the billing of an item

1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Delivery Address**. A window appears, containing the available delivery address for the customer.
3 Select a new delivery address and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Special Instructions**. A report's window appears, containing notes if some have been entered when placing the order.
3 Enter new special instructions or edit the existing ones and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Delivery Type**. A window appears, containing the available delivery types for the customer.
3 Select a new delivery type and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Edit Charge Backs**. A window appears, containing the order items.
3 Select the item in question and click on the **OK** button. Another window opens and asks to enter a charge back code.
4 Enter the new charge back code and click on the **OK** button.

The order is not picked

Available operations :

- All the operations of a picked order
- Adding items
- Editing order items

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- Deleting order items

1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Add Item**.
3 Select the desired sub-menu and proceed such as described in the "Adding items to an order 509 " section.

or

1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Edit Item**. A window appears, containing all the order items.
3 Select the desired item and click on the **OK** button. A new window will be displayed, different for each item. (For boxes and files, for example, it is possible to edit the recipient, as well as whether or not they are permanently out.)
4 Enter the modifications in question and click on the **OK** button

or

1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Delete Items**. A window appears, containing all the order items.
3 Select the item to be deleted and click on the **OK** button.

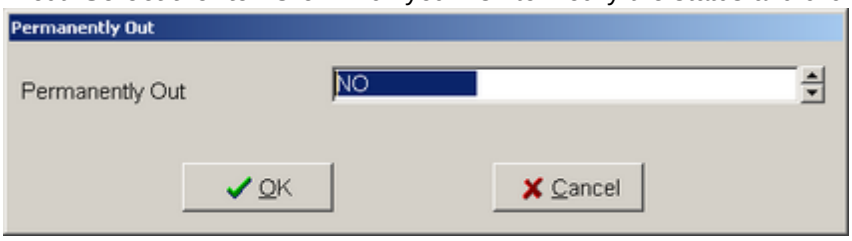
Note : The special instructions added or edited on a PICKED order will not be displayed on the picking list . The ones added or edited on a CLOSED order will not appear on the delivery slip. That is why it is important to take into account the status of an order before performing any modifications.

6.6.2.10 Edit Perm Outs

When placing an order, it is possible for a customer to specify that the item will be permanently out (marked as DELETED) if the item is not to be returned.

If it is necessary to edit which items are permanently out on the order, prior to delivery creation you may do so as follows:

1. In the **Orders->Order** module, navigate to the correct record.
2. From the menu, select **Item->Edit Perm Outs**.
3. A window appears listing order items including whether or not they are marked as permanently out. **Select the items** for which you wish to modify the status and click **OK**. A window appears



4. Set the desired status and click **OK**.
5. When the delivery is created, the items will go to the "Out" or "Deleted" status according to whether they are permanently out, and any space cancellations charges will be applied.

Note: Changes made after the delivery has been created will not affect the item status. Items that should have been marked permanently out can be processed on a deletion list. Items that should not have been marked permanently out can simply be return to the record center when it is time.

6.6.2.11 Edit Recipients

If the recipient for one or more item was incorrectly entered on an order, you may edit it as follows. Note that if picking labels have already been printed, you may wish to reprint these to reflect the

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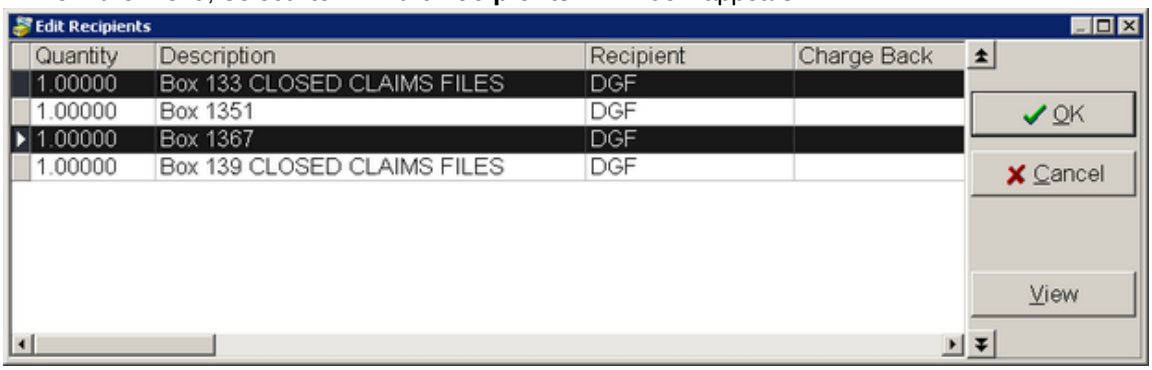
change. Similarly, you may also wish to reprint the delivery slip if delivery creation has already occurred.

1. In the **Orders->Order** module, navigate to the order to be modified.
2. From the menu, select **Item->Edit Recipients**. A window appears.

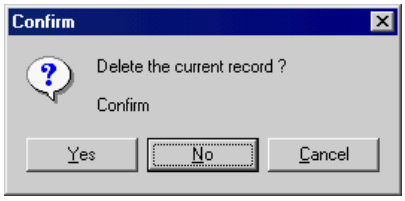


3. Select the items for which you wish to edit the recipients, and click the **OK** button.
4. In the dialogue window that appears, enter the correct recipient then click **OK**.
5. The recipients for these items has been changed. If necessary, reprint the picking labels 524 for these items, and if the delivery slip has already been printed, reprint the delivery slip 536.

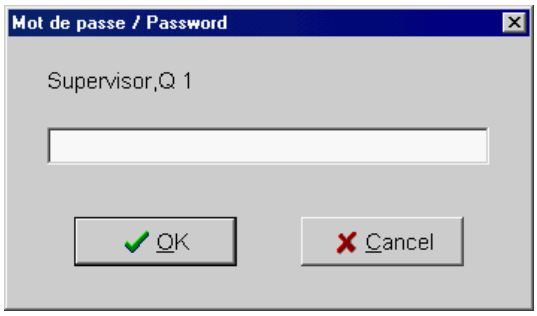
6.6.2.12 Deleting an order

An order can be deleted directly in the *Order* module as long as it is not being picked.

1 Click on **Orders->Order** from the *Main window*.
2 Search for the desired order and keep it on the screen.
3 Click on **File->Delete Order**. A dialog box appears and asks to confirm the operation.



4 Click on the **Yes** button to confirm the deletion. A window appears and asks to enter a password.



5 Enter a password and press **OK**.

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6.6.2.13 Printing thermal labels

After having entered and accepted an order, it is possible to print the labels that will be used for the processing of the items on the order.

1. Click on **Order**->**Order** from the *Main window*.
2. Search for the desired order and keep it on the screen.
3. Click on **File**->**Print Thermal Labels**.
4. Select the boxes or files concerned and press **OK**. The labels are printed automatically.

For boxes
Only one label is printed and must be affixed on the box. It essentially contains the following : the customer code, the order number and date, the box number and description, and the recipient.
The "Delivery Labels" option must be previously activated in the *Customer Information* module to apply here.

For inventoried files
Two labels are printed. The first one contains the customer code, the order number and date, the mention "on file", the information about the file (number, description, RC number, box number where the file is stored), the recipient, and must be affixed on the file. The second label contains the same information, but with the mention "on card" and also contains the bar code of the file. It must be affixed on the out card inserted in the box.
This function is available all the time.

***For non track files**
Two label are printed. The first one contains the customer code, the order number and date, the mention "on file", the information about the file (number, description, RC number, box number where the file is stored), a bar code to identify the out operation, and it must be affixed on the file. The second label contains the same information, but the mention "on card", a bar code for the return operation and the bar code number present on the first label. The second label is affixed on the out card inserted in the box.
This function must be previously activated in the *Customer Information* module to apply.

6.6.2.14 Viewing information about the current order

It is possible to view information about the current order without printing or viewing the picking list or the delivery slip.

Viewing the delivery address of the current order
1. Click on **Order->Order** from the Main window.
2. Get the desired order on the screen.
3. Click on **View->Delivery Address**. The report's window opens on the screen and indicates the delivery address of the order.
4. Click on the **Close** button to end the viewing.

Viewing the items of the current order
1. Click on **Order->Order** from the *Main window*.
2. Get the desired order on the screen.
3. Click on **Item->View** Items. The result's window appears and indicates all the order items.
4. After consultation press **OK** to close the window or select an item and click on the **View** button to produce its detailed report (this report can be printed).

Viewing an estimate of charges for an order
1. Click on **Order->Order** from the Main window.

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2. Get the desired order on the screen.
3. Click on **View->Order Charges**.

Note: Actual charges are based on deliveries rather than orders. The charges listed on this report are those that would be charged for a delivery including only this order.

Viewing purchase orders

5. 1 Click on **Order->Order** from the Main window.
6. 2 Get the desired order on the screen.
7. 3 Click on **View->Purchase Order**.
8. 4 An information window will appear giving the number of the purchase order(s) of the customer associated with the current order.
9. 5 Press **OK**.

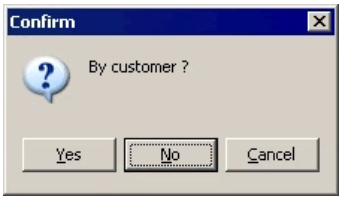
Viewing ordering notes (Alt + F10)

1 Click on **Order->Order** from the Main window.
2 Get the desired order on the screen.
3 Click on **View->Ordering notes**.
4 A window will appears with the ordering notes for the customer. To edit the note enter the changes and press the **Save** button.

6.6.2.15 Viewing or printing reports

Producing a list of the orders not-closed

1 Click on **Orders**->**Orders** from the *Main window*.
2 Click on **Files**->**View Orders**|**Print Orders**->**Orders not-closed**. A message appears.



3 To select a customer press *Yes*. Enter the customer code or press **OK** to have the list of customers (select a customer and it will appear highlighted). Press **OK**.
4 A report is automatically created.

Producing a list of orders by date

1 Click on **Orders**->**Orders** from the *Main window*.
2 Click on **Files**->**View Orders**|**Print Orders**->**Orders By Date**. A window appears.

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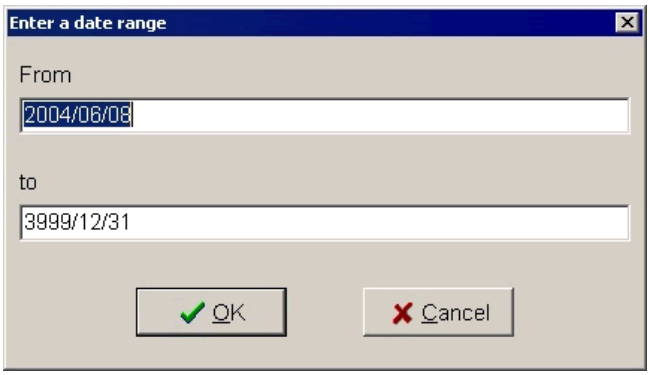

3 Enter a date range. Press **OK**.
4 A report is automatically created.

Producing the picking list for the current order

1 Get the desired order on the screen.
2 Click on **File**->**View Picking List**|**Print Picking List**. The report appears on the screen or is automatically printed from the default printer.

Producing the list of charges for the current order

1 Get the desired order on the screen.
2 Click on **View**->**Order Charges**. The report is automatically displayed on the screen. Click on the **Print** button to print it or on the **Close** button to end the operation.

Producing the list of the authorized users for the selected customer

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **View**->**Authorized Users**. A window appears and asks to enter a customer code.
3 Enter the code of the desired customer and press **OK**. The report is automatically displayed. Click on the **Print** button to print it or on the **Close** button to end the viewing.

6.6.3 Picking List

6.6.3.1 Overview (Picking List)

Once orders have been entered and accepted, the ordered items become available to be picked. Rush orders are picked individually using the Pick-and-run 508 process through the *Orders->Orders* module.

Regular orders may be picked more efficiently by creating *picking lists*, which typically include items from several orders. Picking lists should be generated after each picking cut off time in order to be ready for the next delivery cycle. More active record centers may chose to generate additional picking lists earlier.

Available reports

- None. (See the *Report* 364 module)

Fields 527 **(File->create picking list)**

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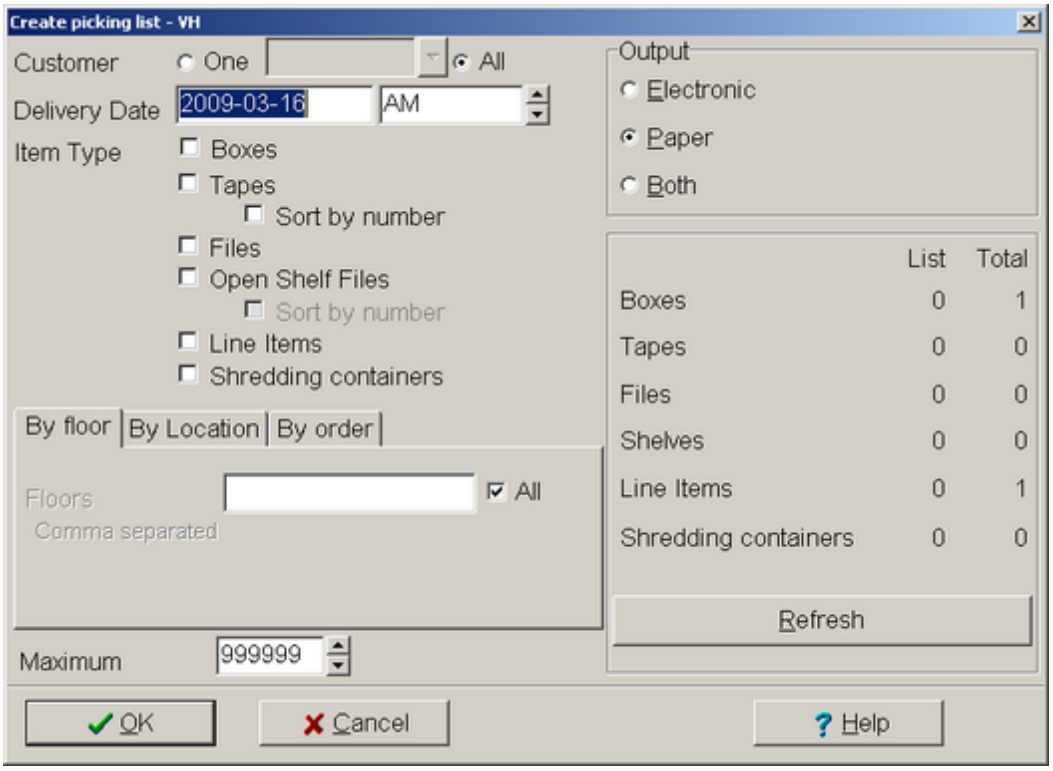
Distinctive menu options:

File menu

- Create picking list 529
- Upload pick results 529
- Reset picking list 530
- Reset Fast order picklist 530
- Manual Picking 531

Module window: (File->create picking list)



6.6.3.2 Picking options

Here is a description of the options available when creating a picking list.

Customer
To limit picking to a specific customer, click on **One**, and select a customer from the list. Otherwise, available items from all customers will be included

Delivery Date
The picking list will be limited to include items for this delivery date and time.

Item Type
Item types not selected will be excluded from the list. Items are typically sorted by location unless the option to **sort by number** is selected.

By floor
The default behaviour is to create a picking list for all floors (or picking levels) of the building. If the

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All checkbox is not selected, you may specify which picking levels to include on the list, separating with commas if multiple are selected.

By location
This section permits you to limit the picking list to include items from the range of locations that you provide.

By order
Entering order numbers in this section will limit the picking list to specific order numbers.
To add an order to the list press the **Add** button, select an order in the list that appears (it will become highlighted) and press **OK**.
To delete an order from the list, select the order (it will appear highlighted) and press the **Delete** button.

Maximum
Limits the total number of items that the list can contain. This is useful for splitting large picking lists among multiple PDTs (or into multiple lists on the same PDT.)

Output
Electronic output is the most commonly used option, which refers to picking with the PDT 104.
Selecting *Paper* causes the picking list to print on the default printer. When picking without any PDT, it is necessary to manually notify EDC RC that items have been picked 531.
Using *Both* paper and electronic output permits one or more people to retrieve items using the paper list and then confirm with the PDT, which is useful when more people than PDTs are available.

List / Total / Refresh
The numbers under *Total* indicate how many of each item type are on orders to be picked, while the numbers under *List* show how many are on the picking list. Clicking the *Refresh* button causes the list to be re-calculated.

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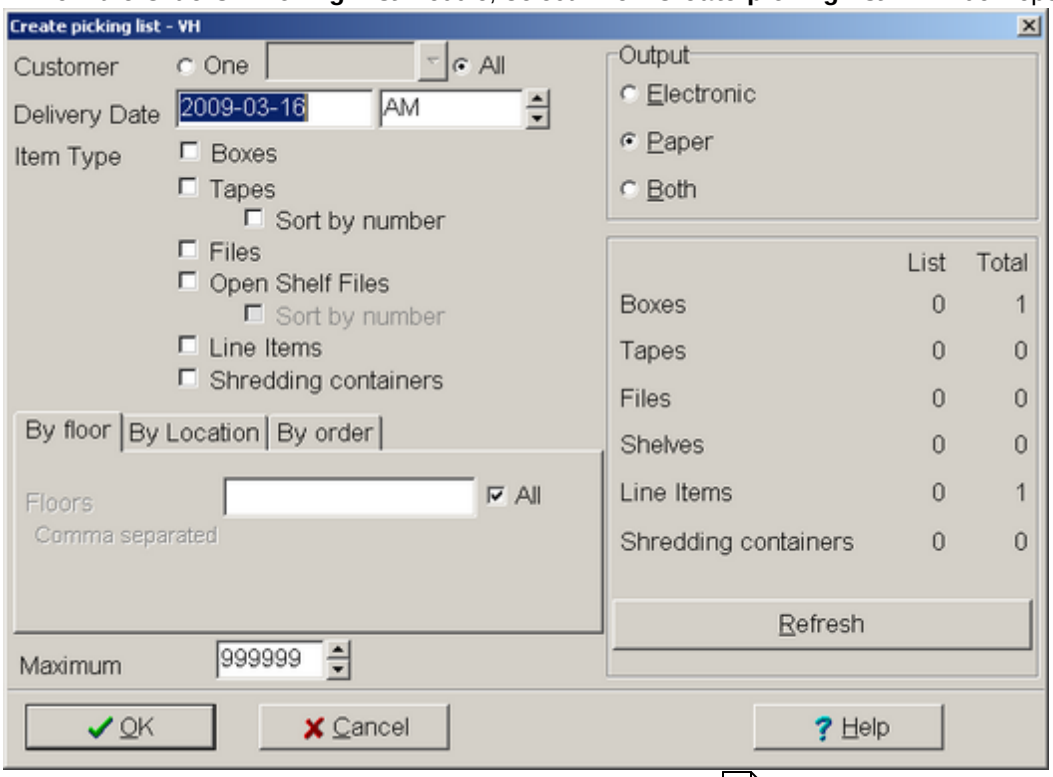
6.6.3.3 Creating a picking list

1. From the **Orders->Picking List** module, select **File->Create picking list**. A window opens



Note : See the previous section for more detail on options 527.

2. Select the desired options to create a picking list, including the *item types* and the desired *output* format.

Typically, line items and shredding containers are only included in the final pick for efficiency.

(Notice the list of total available items to be picked to the far right of the pane. After specifying picking options, clicking the **refresh** button will update the number of items on the list.)

3. Press the **Okay** button. If a *paper* or *both* output options were selected, the picking list will print. This may be separated by picking level, if this option was selected in the customer information module.

4. If *Electronic* or *Both* output options were selected, you will be prompted to prepare the prepare the PDT for download. Place the PDT in the cradle or connect it to the cable, then press **2** to receive. Then click **Okay** on the computer.

- Picking labels will be printed automatically for PRE-ADD or ALL files, depending on the *Print Picking Labels* setting in the System Information module 197.
- *File out card* and *open-shelf out card* labels and *box picking labels* may be printed according to options in the Customer Information module 225.

6.6.3.4 Uploading picking results

1 Click on **Orders->Picking List** from the *Main window.*
2 Proceed to the creation of a picking list (see the previous section 529 for more details).

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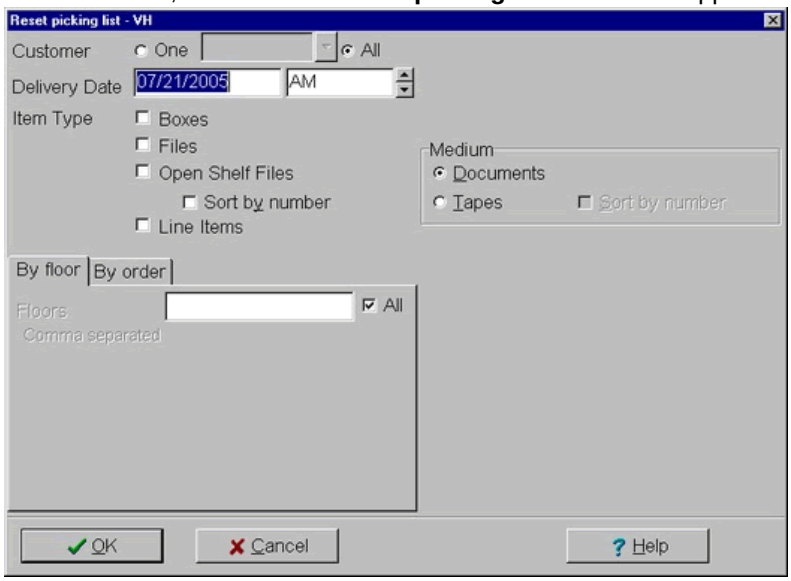
3 Click on **File->Upload Pick Results**. The results are automatically downloaded to the PDT[732].

Note : The PDT must be ready before proceeding to upload the results.

6.6.3.5 Resetting a picking list

If a picking list is lost, it is possible to put the items that were on it back into the list of items to be picked as follows:

1. Open the **Orders->Picking List** module
2. From the menu, select **File->Reset picking list**. A window appears.



3. Enter parameters, then click **OK**.

Items meeting these criteria will go from the *Being picked* state to the *To be picked* state, and can be put onto a new picking list.

Note: If multiple outstanding picking lists meet these criteria, they will all be reset. Items on completed picking lists are in the *Picked* state, and will not be affected.

Picking lists created using **Orders->Order**, **File->Pick and run** can be reset using Reset fast order picklist[530].

6.6.3.6 Resetting a Fast order pick list

This option allows you to reset an outstanding picking list created using the **Orders->Order**, **File->Pick and run** method.

1. Open the **Orders->Picking List** module
2. From the menu, select **File->Reset a fast order pick list**. A window appears.
3. Enter the order number and press **OK**.

Items for this order are once again available to be picked using the pick and run option[508], or manually[531].

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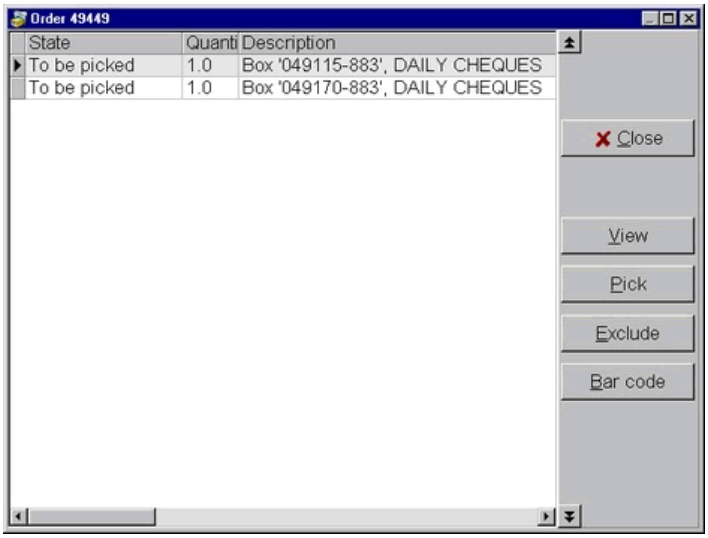
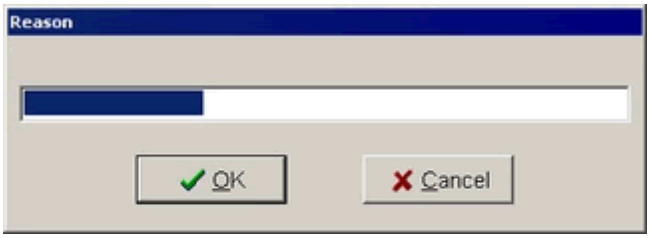
6.6.3.7 Picking items manually

1. Click on **Orders->Picking** List from the Main window.
2. Click on **File->Manual** picking. A window appears.
3. Enter the order number for which you want to pick items manually and press **OK**. A window appears.



4. To mark items as "Picked", select the wanted items (they will appear highlighted) and press the **Picked** button.
5. To mark items as "Excluded", select the wanted items (they will appear highlighted) and press the **Exclude** button. A window appears.



6. Enter a reason and press **OK**.This information will be included with the box and intended recipient on the delivery slip and an excluded items report at the time of delivery creation.

7. To mark items as "To be picked" again, select the same items (they will appear highlighted) and press the **Picked** button.

Note: If the delivery type is by time or 24 hours (ie by night orders or rush orders) the delivery will be closed as soon as the order is manually picked.

To pick items by scanning / typing the barcode, press on the **Barcode** button. A window appears

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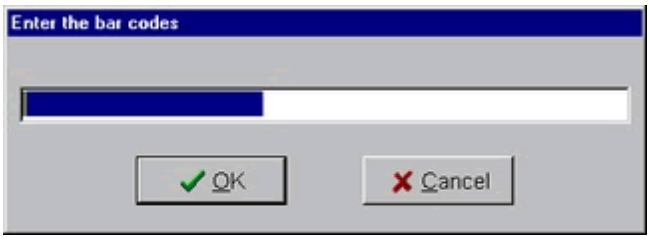


One can enter the barcode(s) manually or scan them with a keyboard wedge scanner.

6.6.4 Delivery Creation

6.6.4.1 Overview (Delivery Creation)

In the systematic work flow at a record center, deliveries are created after all items for the delivery cycle have been picked. This happens after the *picking cut-off times* defined in the *System information* 197 module 197 and potentially over-ridden for specific customers in the *Customer information* 225 module 225.

Available reports

- None. (See the *Report* 364 module)

Tasks

- Creating a delivery 533

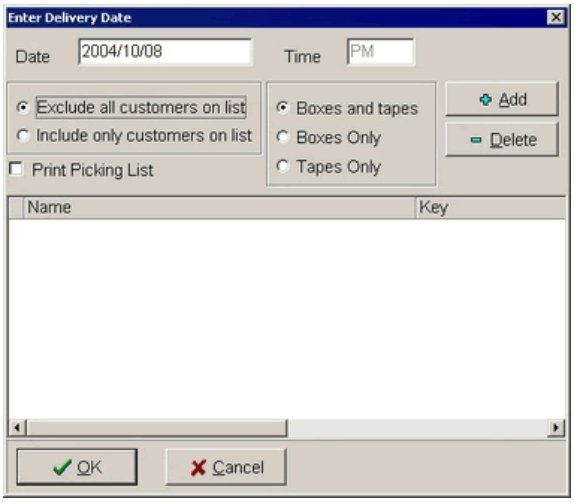
Distinctive menu options:

- None

Related topic

Creating the exclusion list for deliveries 210

Module window



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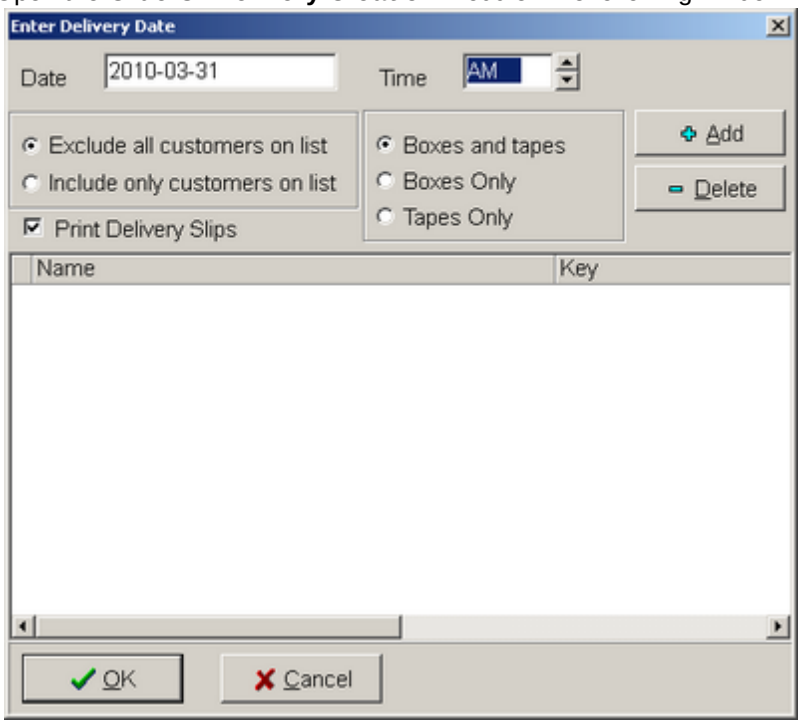
6.6.4.2 Creating one or many deliveries

1. Open the **Orders->Delivery Creation** module. The following window is displayed:



2. Make any necessary modifications to the default delivery creation parameters:

- The **delivery date** and **time** will default to the current delivery cycle. If desired, change this.
- If you wish to create deliveries only for **"tape only"** customers separately, select the corresponding option.
- The lower panel of the window contains an **exclusion list** 210 specifying customers for whom deliveries are created separately. This is defined in the System Information 195 module, and may be temporarily modified here by clicking on the **Add** or **Delete** buttons to add or remove customers from it. To create deliveries for the rest of the customers, accept the default setting of **Exclude all clients on list**. To create the non-standard deliveries, select the "**Include only clients on list**" option.

- If you wish to print delivery slips, check the "**Print Delivery Slip**" checkbox. Note that delivery slips may reprinted through the delivery module, and a commonly printed through the Delivery Route 543 module. Slips for deliveries that cannot be included on delivery routes will be printed on delivery creation even if this option is not selected.

3. Press **OK**. The system will create deliveries according to all the parameters previously selected.

Notes:
- If orders for a delivery were not completely picked, that delivery will go to the *Created* state instead of directly to the *Closed* state.
- If all items for the delivery were excluded during picking and there are no returns or line items, the delivery will become verified, and no trip charge or fuel surcharge will be applied.

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6.6.5 Delivery

6.6.5.1 Overview (Delivery)

This module permits various operations on individual deliveries once they have been created, including making changes and adding items. It is possible to perform truck validation in this module. However, it is more efficient to do this through the Delivery Route 543 module if validating more than one delivery 546.

Available reports
- picking list for the current delivery
- delivery slip for the current delivery
- individual report of items for one delivery

Fields 535 **(see the next section)**

Distinctive menu options:

File menu
- View | Print picking list 535
- View | Print delivery slip 536
- Truck validation 536
- Download list to PDT 538
- Add Labor 538
- Print recipient labels 536
- Print address labels 537
- Check item delivery 537 number

View menu
- View orders 539
- View items 539
- History 539

Edit menu (adding services to a delivery)
- Box retrieval 538
- File retrieval 538
- Box sale 538
- Box returns 538
- Line item 538
- Box search 538
- File search 538

Module window:

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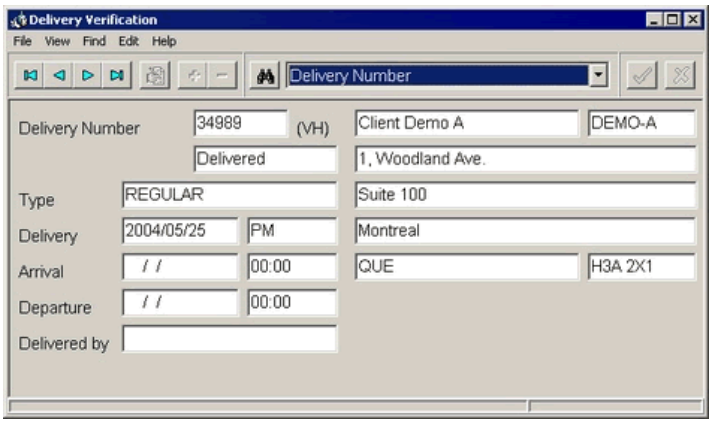

6.6.5.2 Fields (Delivery)

Delivery Number
Unique number assigned by the system upon delivery creation, followed in brackets by the building from which the items are delivered.

Status
Status of the delivery.
- Created: delivery was created but orders are not fully picked
- Closed: all items have been picked
- On truck: truck validation has been completed
- Delivered: the delivery return has been started but not completed.
- Returned: the return has been completed, but items remain to verified to permanent locations
- Verified: all return items have gone to permanent locations.

Type
Delivery type 621, as defined by the record center in the *Accounting->Delivery Type* module.

Delivery
Date and time in the day (AM or PM) when the delivery has to be done.

Arrival, Departure, Delivered by
Information collected when the delivery is performed with PDT.

Customer Information
Customer name, customer key 225, and delivery address 300 associated with the delivery.

6.6.5.3 Viewing or printing a picking list

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Click on **File -> View|Print picking list**
3 A window appears.

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4 Click **Yes** if you want the labels to be printed as well. Click **No** if you do not want them printed (click **Cancel** if you want to abort the present operation.)
5 The picking list will automatically appear or be printed.

6.6.5.4 Viewing or printing a delivery slip

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Click on the **Cancel** button
3 Click on **File -> View|Print delivery slip**
4 The delivery slip will automatically appear or be printed.

6.6.5.5 Performing a truck validation for a delivery

Note: If more than one delivery is being validated, it is much more efficient to do so using a delivery route 546 in the Orders->Delivery Route module 543 than to validate each delivery separately.

1. Open the **Orders->Delivery** module
2. From the menu, select **File ->Truck validation->Download list to PDT**. A message to prepare PDT for download appears.
3. Prepare the PDT 104 to receive information (1-Receive)
4. Perform the validation with PDT

- 3-Processing
- 7-Truck validation
- enter or scan the delivery number
- enter or scan the items' bar codes
- when you are finished press 0 and Enter. For customers that bill by container, the PDT will ask the "Qty shipped"; enter the number of containers on the truck and press Enter

5. In the **Orders->Delivery** module, select **File ->Truck validation->Upload list from PDT**. A "Downloading" message appears.
6. Send the information from the PDT 104

- 2-Send results
- 7-Truck validation
- select a delivery by entering its number or press 1-All and Enter to upload them all

Note: If the customer does not have the truck validation option, an error message will appear. This option may be changed in the options section of the Customer->Customer Information 237 module.

6.6.5.6 Printing recipient labels

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Click on **File -> Print recipient labels**. A window appears.

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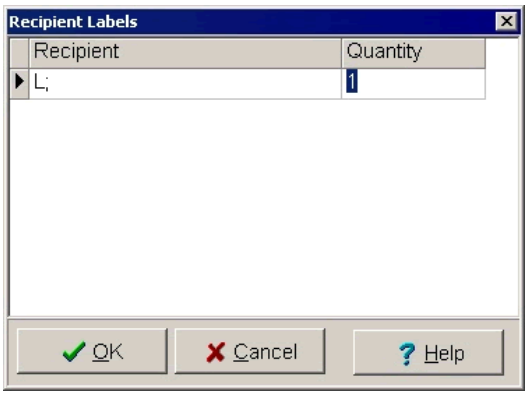


3 Select the quantity of labels wanted for each recipient and press **OK**

6.6.5.7 Printing address labels

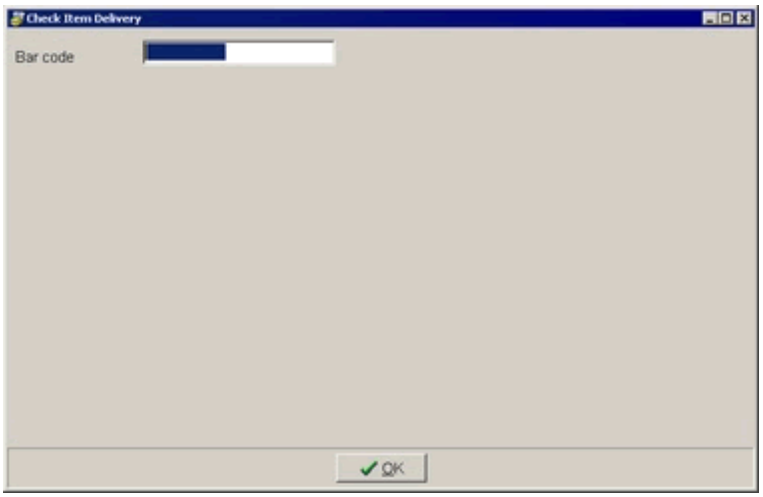
Address labels may be useful when using external courier for delivery. To print an address label for the delivery:

1. Open the **Orders->Delivery** module
2. Navigate to the desired delivery
3. From the menu, select **File->Print address labels**., or press the **F8** key.
4. Enter the quantity of labels to be printed.

6.6.5.8 Display the delivery number of an item

This allows the record center to find the delivery number of an item.

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Click on **File -> Check Item Delivery**
3 A window appears.



4 Enter the item's bar code, press *Enter* (on the keyboard)
5 The item's delivery number and the delivery state will appear. To exit press **OK**.

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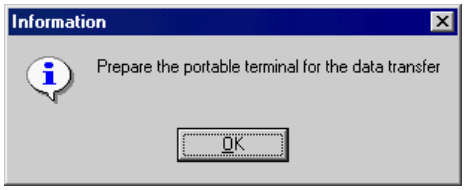
6.6.5.9 Downloading a delivery to the PDT

When setting the *Delivery with PDT* 225 field to *Yes* in the *Customer Information* module, the order items of a customer can be delivered with the PDT. The deliveries are downloaded to the PDT in the *Delivery Route* 547 module (it downloads an entire route) or in the current module (only the current delivery is downloaded).

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Search the desired delivery and keep it on the screen, then click on **File**->**Download list to PDT**. A dialog box appears.



3 Prepare the PDT to receive the data and press **OK**. All the items of the current delivery are downloaded to the PDT, delivered as returned items. The employee of the record center will just have to deliver the items as described in the "Delivering items with the PDT 133" section.

6.6.5.10 Adding services to a delivery

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Find the desired delivery, keep it on the screen and perform one of the following operations :

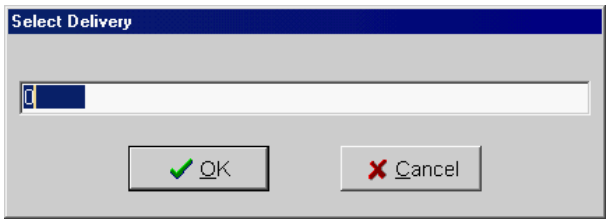
- To add a box click on **Edit**->**Box Retrieval**.
- To add a file click on **Edit**->**File Retrieval**.
- To add a box sale click on **Edit**->**Box Sale**
- To add a document return click on **Edit**->**Box Returns**.
- To add a document search click on **Edit**->**Search**.
- To add other services click on **Edit**->**Line Item**.
- To add a box or file search click on **Edit**->**Box Search**|**File Search**.

3 For each of these operations, follow the procedures described in the "Adding items to an order 509" section of the *Order* module.

Note: The delivery must be in the CREATED, CLOSED or ON TRUCK state.

6.6.5.11 Adding labor to a delivery

1 Click on **Orders**->**Delivery** from the *Main window*.
2 Click on **File**->**Add Labor**. A window appears.



3 Enter the desired delivery number and press **OK**. A window appears.

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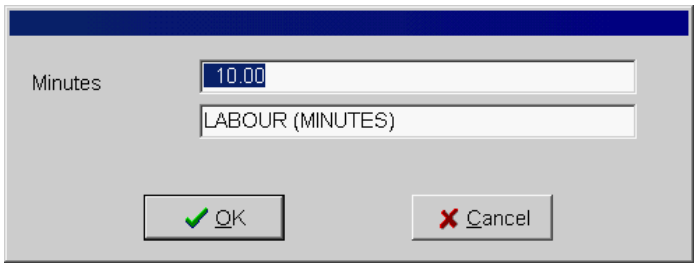

Note : When the customer is billed by department or charge back (settings of the *Customer Information* 226 module) a window appears previously, in order to specify who will be charged for the labor.

4 Enter the quantity of labor minutes to add to the delivery and press **OK**.

6.6.5.12 Viewing the information about the current delivery

Viewing the orders of the current delivery

1 Click on **Order**->**Delivery** from the *Main window*.
2 Click on **View**->**View Orders**. The list of the orders included on the current delivery is automatically displayed. Press **OK** to end the operation.

Viewing the items of the current delivery

1 Click on **Order**->**Delivery** from the *Main window*.
2 Click on **View**->**View Items**. The report's window is automatically displayed. Press **OK** to end the operation.

Viewing the history of the current delivery

1 Click on **Order**->**Delivery** from the *Main window*.
2 Click on **View**->**History**. The report's window is automatically displayed. Press **OK** to end the operation.

6.6.6 Imaging on Demand

6.6.6.1 Overview (Imaging on Demand)

Delivering files electronically rather physically can be a convenient, cost-effective, and environmentally-friendly option. The processing of Imaging on demand orders and deliveries is very similar to that of physical ones, except that documents are uploaded using this module, for viewing through ActiveWeb (which requires a license that includes imaging) or EDC ActiveFile.

Available reports

- None. (See the *Report* 364 module)

Distinctive menu options:

File menu

- Scan items for a delivery 540

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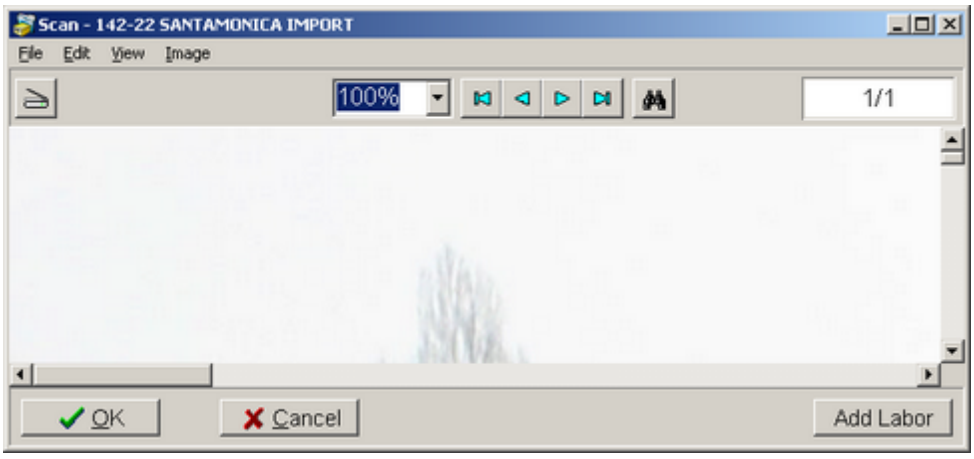
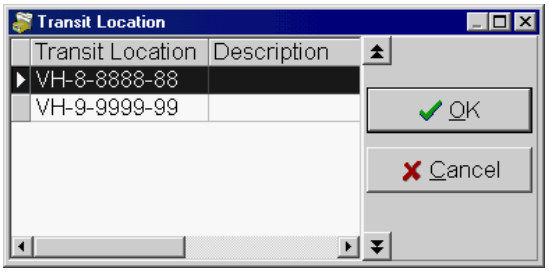
Module window:

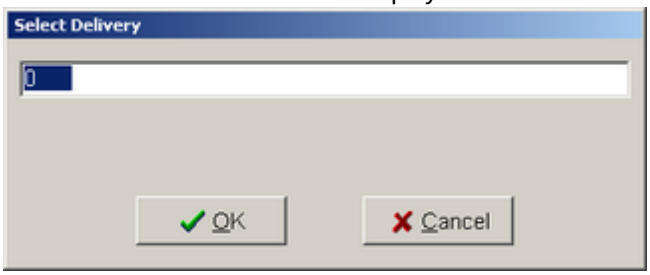


6.6.6.2 Scanning items for a delivery

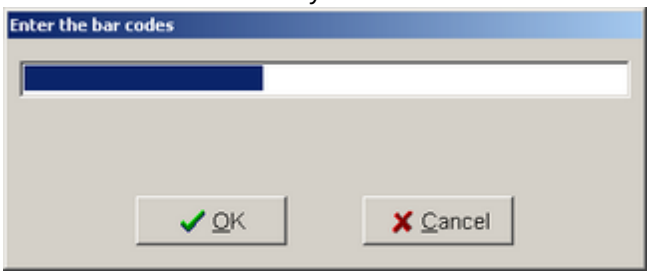
1. Open the **Orders->Imaging On Demand** module. A window appears.



2. Select a transit location where the files will be stored before being scanned and click on the **OK** button. A second window is displayed.



3. Enter the desired delivery number and click on the **OK** button. Another window appears.



4. Scan or enter the bar code of a first file that must be scanned and click on the **OK** button. The imaging window opens on the screen.

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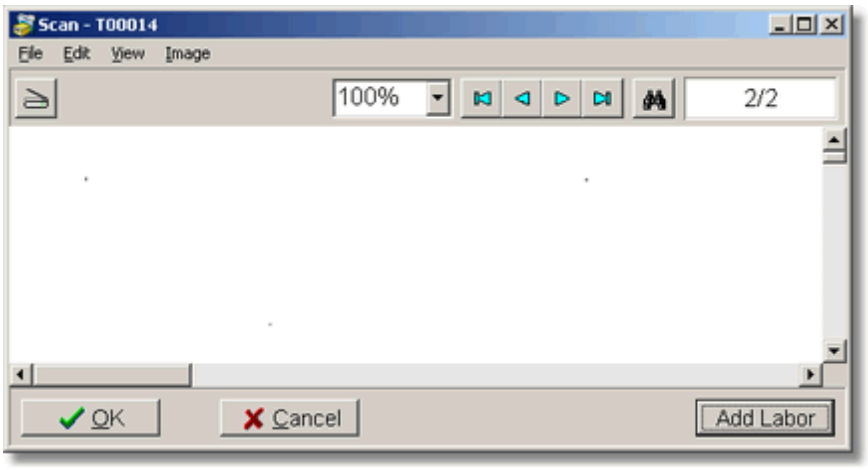
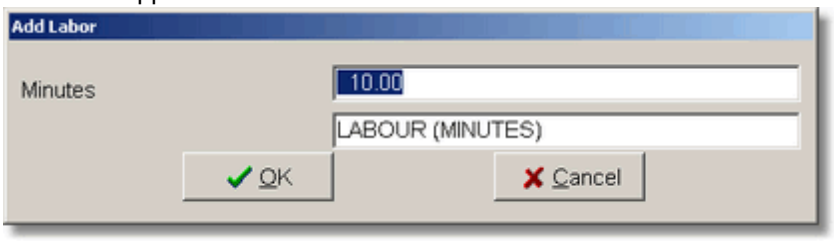
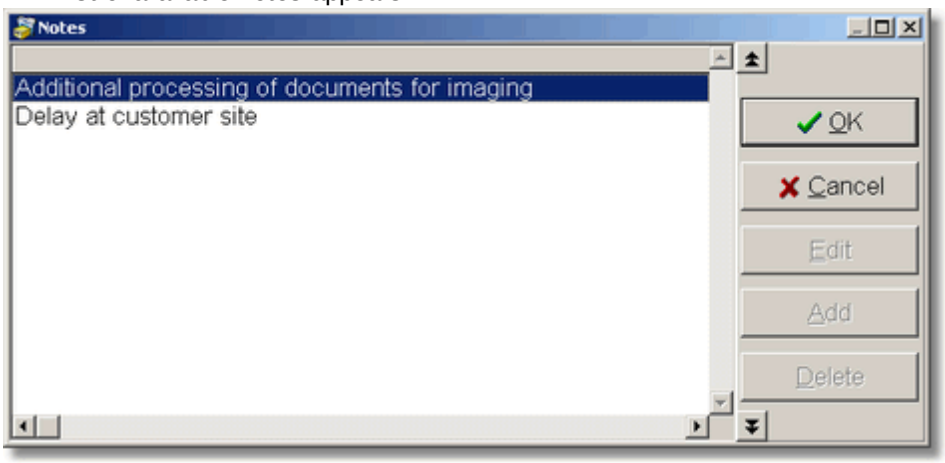


5. You may scan images directly, or import them. (see Imaging on demand - importing images 543)
6. If a scanner has not been previously selected, click on **File->Select scanner** and choose one of the scanner engine attached to the workstation.
7. Prepare the document that will be imaged and click on **File->Scan**. A window appears, different for every scanner engine.
8. Proceed to the imaging by following the indications of the scanner. When the scanning is done, the scanned images appear on the window opened in 4.
9. Edit the image document 543 (optional)
10. If it is necessary to add labor charges, you may do so by clicking the **Add Labor button**. A window appears.



11. A list of available notes appears



12. Select the desired message, then click **Ok**.

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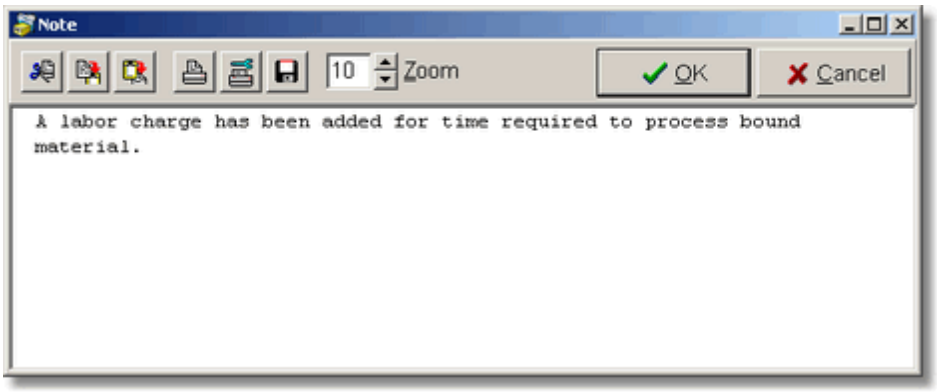
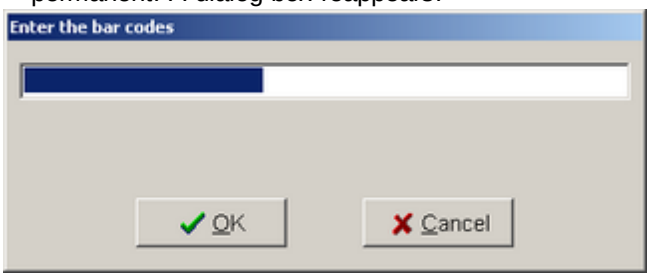
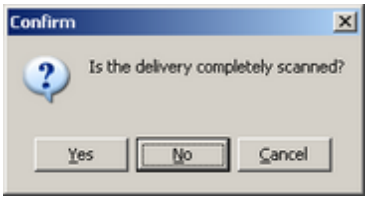


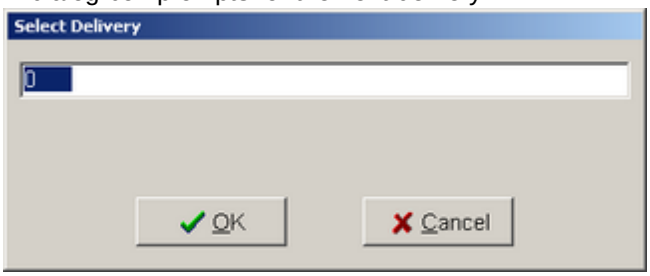
13. Edit the notes if necessary, then click **Ok**.
14. Click on the **OK** button to save the images, and then **Yes** to confirm that images will become permanent. A dialog box reappears:



15. Repeat the above steps while additional files remain to be scanned on the same delivery, then click the **Cancel** button once all items for the delivery have been scanned. A dialog box appears.



16. Click the **Yes** button if this delivery is complete, or **No** if additional items will be scanned later. A dialog box prompts for the next delivery.



17. Scan the next delivery, or click the **Cancel** button when done.

As soon as a delivery is completely scanned, the an e-mail with a link to ActiveWeb (as specified in the System Information module) 205 is sent to the authorized user on the order. The delivery will automatically be set as delivered and as returned.

Note : An SMTP address 197 for the system (System Information module) and an email address 276 for the user (Authorized User module) must have been set beforehand. For instructions on setting up a customer to using imaging, see "Setting up a customer to use Imaging 88".

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6.6.6.3 Editing an image

Between scanning and image and saving it, it is possible to perform some edits.

1. Perform imaging on demand 540, until the image has been scanned but not saved
2. From the imaging window, select the desired image editing option, as described for the imaging module 338. (Note that not all options are available.)

6.6.6.4 Importing images

In addition to scanning images through the imaging on demand module, you may also import images of type bmp, png, eps, afi, vst, tga, dcx, pcc, pcx, jpeg, jpg, tif or tiff.

1. Perform imaging on demand 540 until the file barcode has been scanned, opening an imaging window.
2. From the menu, select **File->Import** A window appears, different for each computer.
3. Browse to the images and click on the **Open** button.
4. The images will be imported and displayed on screen.
5. Continue with imaging on demand.

Note: You will have to manually specify the quantity shipped 615 in the delivery billing module if you wish to apply the per-page scanning fees on imported images (this is not the case when images are scanned directly). The typical procedure would be to write the number of pages on the delivery slip, and then modify the quantity shipped during the periodic review of delivery slips.

6.6.7 Delivery Route

6.6.7.1 Overview (Delivery Route)

The *Delivery Route* module organizes and streamlines the process of working with multiple deliveries for different addresses.

Available reports

- list of deliveries included on the current delivery route 547
- delivery history of one vehicle for a specific time period 547

Fields 544 **(see the next section)**

Tasks

- Creating a delivery route 545
- Editing a delivery route 546
- Deleting a delivery route 546
- Downloading a delivery route on the PDT 547

Distinctive menu options:

File menu

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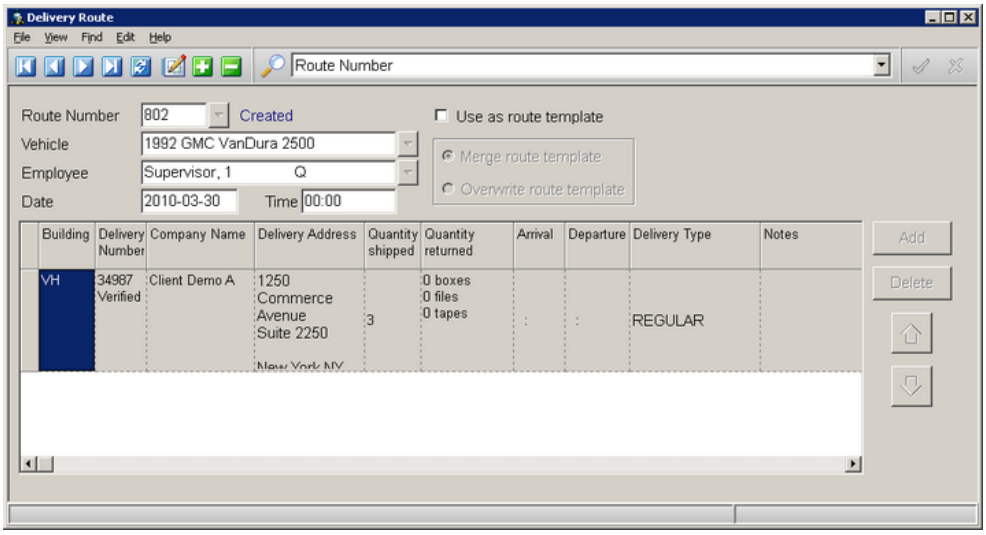
- Print delivery slips of route 546
- Truck validation 546
- Download deliveries to PDT 547

View menu
- Notes 548

Edit menu
- Notes 548

Module window



6.6.7.2 Fields (Delivery Route)

Route Number
A number identifying the route, assigned sequentially by the system.

Vehicle
The delivery vehicle used on this route, selected from the list defined in the Delivery Vehicle module 181.

Employee
The employee performing the delivery, selected from the list of active record center employees defined in the Employee module 170.

Date and Time
These fields accept the date and start time for the delivery route. The date defaults to the creation date, and the time is optional.

Status
The value of this field goes from "*Created*" to "*On truck*" once truck validation for the route 546 has been successfully completed. Note that if no deliveries on the route require truck validation, this route may remain in the "*Created*" state.

Use as route template
A route template specifies a list of delivery addresses and the order in which to service them. Once a template has been named in the Management->System Information module 211, it is learns from

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the delivery addresses included and their order when the "*Use as route template option is selected* ".

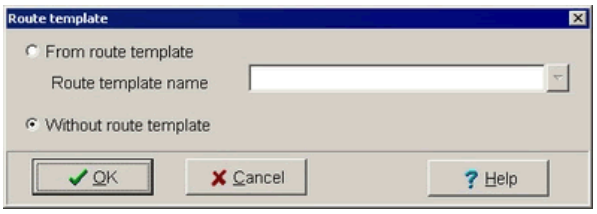
- **Merge route template:** Delivery addresses on the current route will be added to the route template, with these addresses merged in their current order.
- **Overwrite route template:** The current delivery addresses in their present order will replace the existing route template.

Delivery list
This list displays the deliveries, with some details. Using the buttons to the right, it is possible to add, remove, or reorder deliveries on the route. In Edit mode (press **Ctrl-E**), it is possible to manually record the departure and arrival time for each delivery on the route.

6.6.7.3 Creating a delivery route

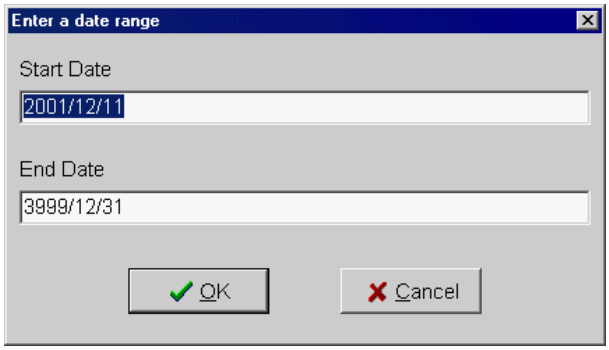
This tool helps you organize the different trips you will be making daily to your customer's offices, by helping set up an order in the deliveries. The template features will save time by placing the deliveries in the exact delivery address order you set them up (see the Creating Routes and Templates 61 topic for a step by step procedure).

1 Click on **Orders**->**Delivery Route** from the *Main window*.
2 Click on **Edit**->**Add**. A window appears.



3 Select a vehicle and an employee; enter a date and time for the beginning of deliveries in the appropriate fields.
4 Perform one of the following operations :

- To add deliveries on the route, click on the **Add** button up to the blue arrows. A window appears.



Select a range of dates to scroll for deliveries and press **OK**. A window opens.

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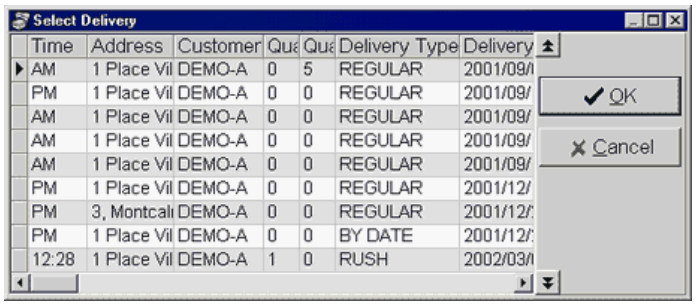
Select Delivery
Time
Address
Customer
Qua
Qua
Delivery Type
Delivery
AM 1 Place Vil DEMO-A 0 5 REGULAR 2001/09/
PM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
PM 1 Place Vil DEMO-A 0 0 REGULAR 2001/12/
PM 3, Montcali DEMO-A 0 0 REGULAR 2001/12/
PM 1 Place Vil DEMO-A 0 0 BY DATE 2001/12/
12:28 1 Place Vil DEMO-A 1 0 RUSH 2002/03/
OK
Cancel

Note : This window contains the lists of all the deliveries to be done within the range of dates previously entered.

Select the desired deliveries (they will appear highlighted) and press **OK**. The selected deliveries now appear in the module window. This order can be modified by selecting a delivery in the main window and by clicking on the blue arrows to move it.

- To remove a delivery from the route, select the desired delivery in the main window and click on the **Delete** button up to the blue arrows.

5 Click on the **Accept** button when finished.

6.6.7.4 Editing a delivery route

1 Click on **Orders**->**Delivery Route** from the *Main window*.
2 Find the desired delivery route and keep it on the screen.
3 Click on **Edit**->**Edit**.
4 Edit the information in the appropriate fields.
5 To add or remove deliveries, proceed as described in the previous section 545.
6 Click on the **Accept** button to save the changes.

6.6.7.5 Deleting a delivery route

1 Click on **Orders**->**Delivery Route** from the *Main window*.
2 Find the desired delivery route and keep it on the screen.
3 Click on **Edit**->**Delete**. The delivery route is automatically delete in the system and all the deliveries that were included on it will have to be placed on another route.

6.6.7.6 Printing delivery slips for a route

1. Click on **Orders->Delivery Route** from the *Main window*.
2. Navigate to the desired delivery route.
3. From the menu, select **File->Print delivery slips of route**.

The delivery slips will be printed in the order in which they appear on the route.

6.6.7.7 Validating items for a delivery route

Note: Delivery routes make truck validation much more efficient. Some large record centers that are set up with well-defined shipping areas perform all of their truck validation at once, using a master delivery route that includes all delivery addresses. After all delivery items have been grouped and validated, they then delete this delivery route so that the deliveries become available to go onto the actual delivery routes.

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1. Open the **Orders->Delivery** module
2. From the menu, select **File ->Truck validation->Download list to PDT**. A message to prepare PDT for download appears.
3. Prepare the PDT 104 to receive information (1-Receive)
4. Perform the validation with PDT

- 3-Processing
- 7-Truck validation
- enter or scan the delivery number
- enter or scan the items' bar codes
- when you are finished press 0 and Enter. For customers that bill by container, the PDT will ask the "Qty shipped"; enter the number of containers on the truck and press Enter

5. In the **Orders->Delivery** module, select **File ->Truck validation->Upload list from PDT**. A "Downloading" message appears.
6. Send the information from the PDT 104

- 2-Send results
- 7-Truck validation
- select a delivery by entering its number or press 1-All and Enter to upload them all

Note: If the customer does not have the truck validation option, an error message will appear. This option may be changed in the options section of the Customer->Customer Information 237 module.

Note: When all the items have been truck validated, *On truck* will appear beside the *Route number* field.

6.6.7.8 Downloading a delivery route for delivery with PDT

The Delivery with PDT 237 parameter in the options section of the *Customer->Customer Information* module determines whether (outgoing) deliveries are always or never performed with PDT for this customer.

(If a delivery requiring PDT was done without it, it can be "delivered" manually in the Delivery Maintenance 579 module.)

To download deliveries for a route to the PDT:

1. Open the **Orders->Delivery Route** module to the appropriate route (or create a new delivery route 545)
2. From the menu, select **File->Download deliveries to PDT**. A message to prepare the PDT for download will appear.
3. Prepare the PDT for download by placing it in the cradle or plugging in the cable, then pressing **1-Receive** from the main menu.
4. Click the **Ok** button on the computer to transfer the data.

6.6.7.9 Viewing or printing report of the current route or delivery history of vehicles

The report of the Current Route lists the delivery addresses and summarizes the number of items to be dropped off and returned at each location. It includes spaces to enter the arrival and departure time for each site, as well as the start and end mileage of the vehicle. This can be useful to drivers and supervisors in planning and managing delivery routes.

The *Delivery History* report lists similar information, by date, for a range of dates. ul

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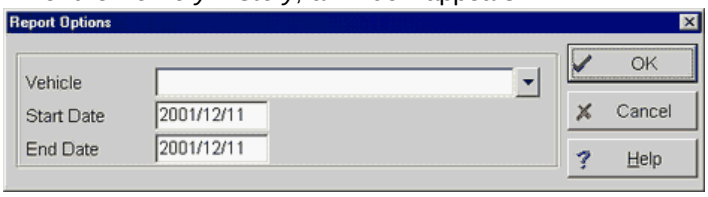
1. Open the **Orders->Delivery Route** module.
2. From the menu, select **File->View Report|Print Report->Current Route|Delivery History**.

- For the *Current Route*, the report will be produced immediately.

- For the *Delivery History*, a window appears.



- Select the vehicle for which the delivery history is to be produced, enter an range of delivery dates and press **OK.**
- The report will be produced.

6.6.7.10 Editing or viewing delivery route notes

Delivery route notes can be viewed and edited in EDC RC, and will appear above the list of deliveries on the current delivery route[547] report commonly used by drivers.

To view delivery route notes:
1. Open the **Orders->Delivery Route** module to the desired delivery route.
2. From the menu, select **Edit->Notes**.

To view delivery route notes:
1. Open the **Orders->Delivery Route** module to the desired delivery route.
2. From the menu, select **View->Notes**

6.6.8 Return Delivery

6.6.8.1 Overview (Return Delivery)

It is necessary to return every delivery in this *Orders->Return Delivery* module, to inform *EDC RC* of any returning items, or to confirm that there are none.

Available reports
- Return slip for a delivery[560]
- Refiling list for a delivery[560]
- (Other reports may exist in the *Report*[364] module)

Fields (None)

Tasks
- Returning a delivery[549]
- Adding or removing items from a return[551]
- Uploading a return from the PDT[557]
- Downloading files to refile with the PDT[558]
- Creating or resetting a refile list[559]
- Viewing or printing a return slip[560]

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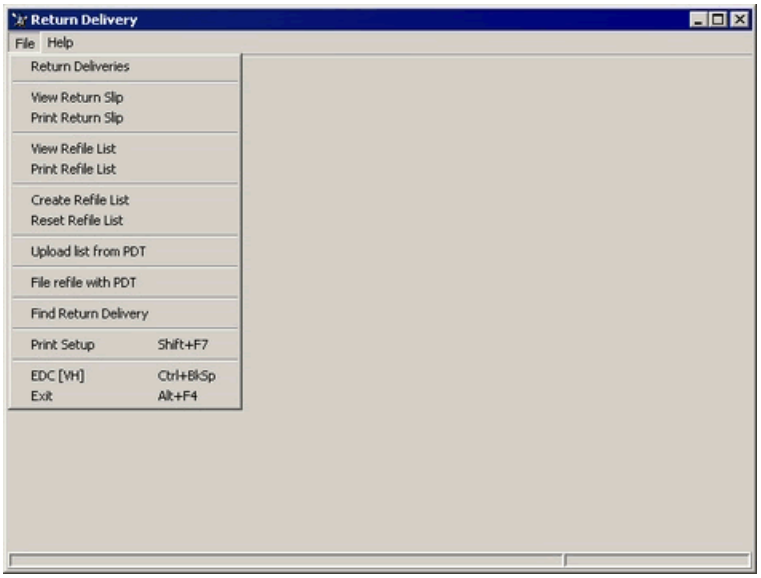
- Viewing or printing a refile list 560
- Finding the return delivery of an item 560

Distinctive menu options:

File menu

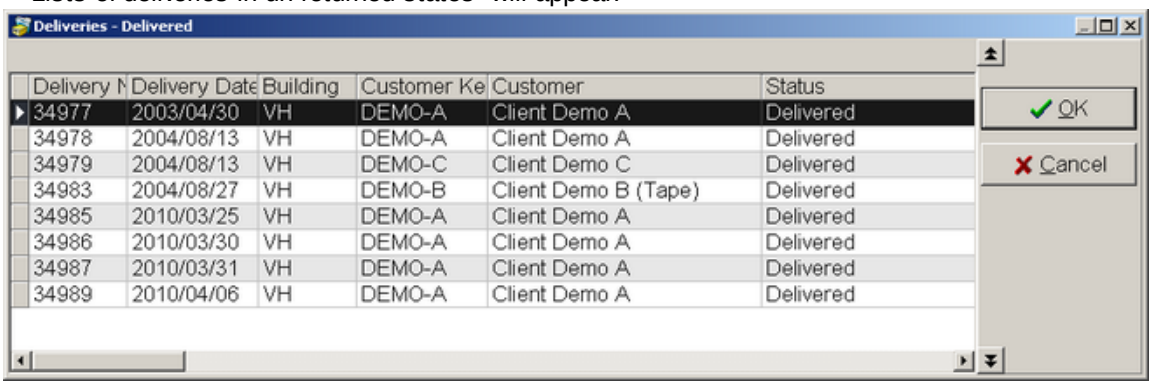
- Return Deliveries 549
- View | Print return slip 560
- View | Print refile list 560
- Create refile list 559
- Reset Refile list 559
- Upload return delivery list from PDT 557
- File refile with PDT 558
- Find return delivery 560

Module window:



6.6.8.2 Returning a delivery

1. Click on **Orders->Return Delivery** from the *Main window*. A window appears, prompting for a delivery number.
2. Enter the delivery number in question and press **OK**. If you do not enter a valid delivery number, Lists of deliveries in un-returned states will appear.


Deliveries - Delivered
Delivery N
Delivery Date
Building
Customer Ke
Customer
Status
34977 2003/04/30 VH DEMO-A Client Demo A Delivered
34978 2004/08/13 VH DEMO-A Client Demo A Delivered
34979 2004/08/13 VH DEMO-C Client Demo C Delivered
34983 2004/08/27 VH DEMO-B Client Demo B (Tape) Delivered
34985 2010/03/25 VH DEMO-A Client Demo A Delivered
34986 2010/03/30 VH DEMO-A Client Demo A Delivered
34987 2010/03/31 VH DEMO-A Client Demo A Delivered
34989 2010/04/06 VH DEMO-A Client Demo A Delivered
OK
Cancel

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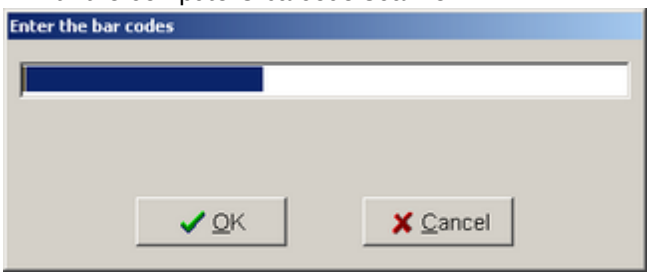
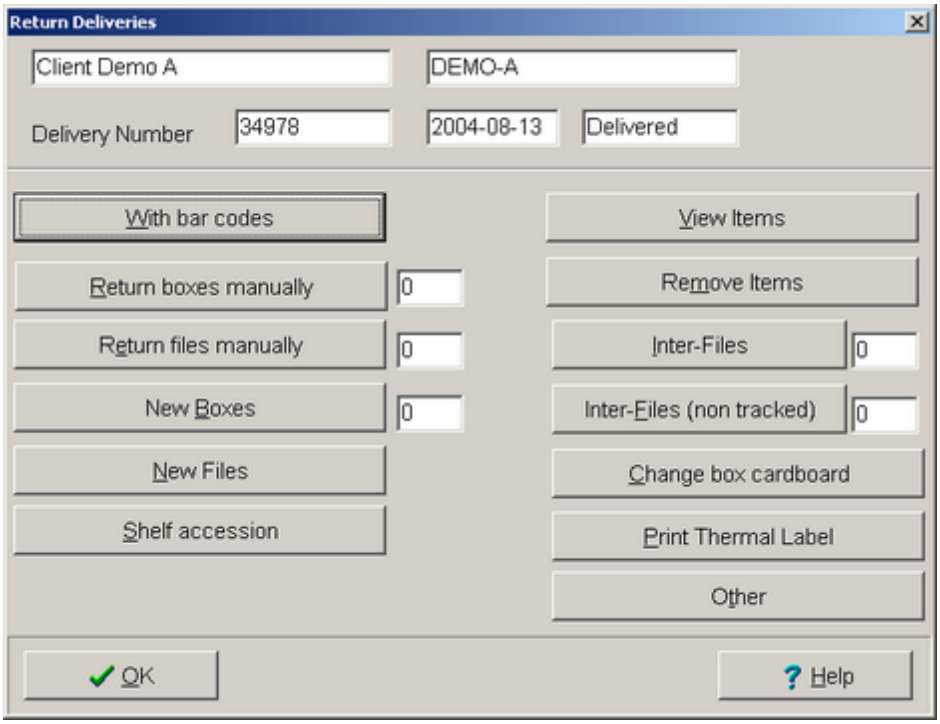
3. Once you have selected a delivery, if your building has multiple transit locations[186], you will be prompted to select one to return to.
4. Select a transit location and press **OK**. A window is displayed and asks to enter the quantity of boxes that are returned.

Note : The system indicates by default the quantity of return boxes entered on the orders. It can be modified here to reflect the real quantity of boxes picked up at the customer's office.

5. Enter the number of return items and press **OK**. A window appears for you to scan a first item with the computer's barcode scanner.



6. Scan each barcoded item. Click on the **Cancel** button when done to access the delivery return options (following window).



7. If required, click the appropriate buttons to add or remove items to or from the return delivery (view next section[551], adding or removing items from a return, for more details). Click **OK** when done. A dialog box asks if the return is complete and provides a summary of the return

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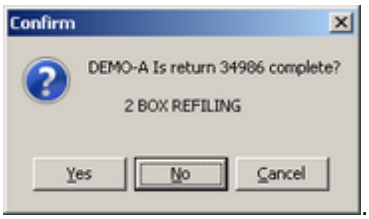


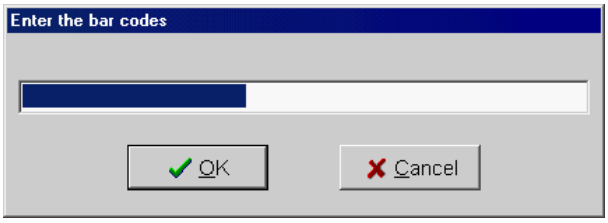
8. Click on the **No** button if items remain to be added to this return at a later time. Otherwise, click on the **Yes** button to confirm that the return is complete. A dialog box asks "Print Refile List (delivery number)?".
9. If a refile list is to be printed, click **Yes**, otherwise click **No** (which is the default). A dialog box asks if another delivery must be returned.
10. Click on the **Yes** button to return another delivery or click on the **No** button to go back in the main window of the module and have access to the other options.

6.6.8.3 Adding or removing items from a return

The following operations are available while performing a return delivery (see the previous section) 549.

Returning a box by reading bar codes

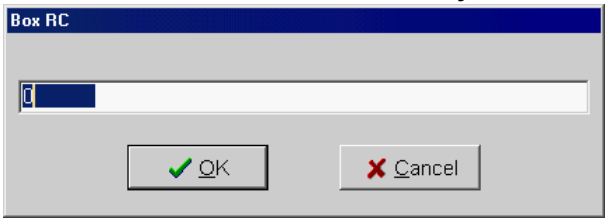
1. Click on the **With bar** codes button. A window appears.



2. Read a box with the bar code reader attached to the workstation or enter it manually and press **OK**. Sometimes, a message appears and indicates that the box contains inventoried files. A window follows that message and allows to return the files in question.
3. Read or enter the bar code of the first file and press **OK**. Repeat the operation as many times as needed.

Manually returning a box

1. Click on the **Return boxes manually**. A window appears.



2. Enter the *RC number* of the box and press **OK**.
3. If the box contains inventoried files and the file in box tracking option 225 is turned on, a window appears.

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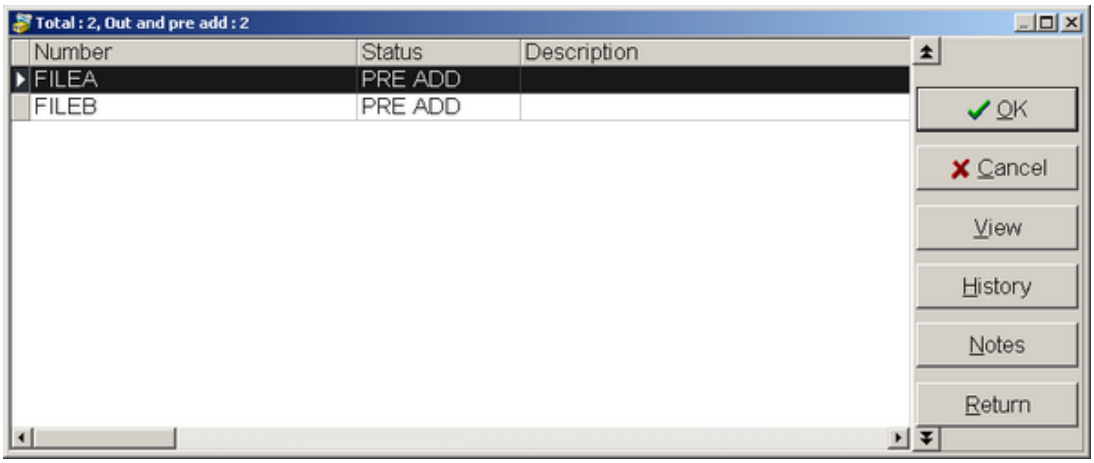
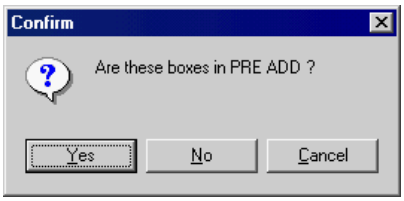


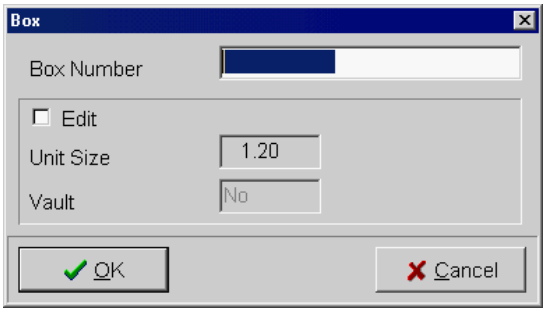
4. Select the files being returned in the box and click the **Return** button.
5. Press the **OK** button.
6. If a message indicates that files are missing, double-check the box for them, then follow your record center's procedures for handling files missing on a return.

Adding a new box to the inventory

1. Click on the **New Boxes** button. A dialog box appears.



2. Click on the **Yes** button if the boxes are already in *PRE ADD* in the inventory, or click on the **No** button if it is not so. For boxes already entered in the system, the following window appears instantly. For boxes that are not inventoried, two windows appear before this window and allows to choose a department and document type for the new boxes.



3. Enter the box number and press **OK**.

Note : It is possible to check off the *Edit* option, in order to be able to change the box volume and to specify if it must be stored in the vault. Otherwise, boxes automatically take the size of the first location of fixed size that they are moved to.

***Adding a new file to the inventory**

1. Click on the **New Files** button. A window appears.

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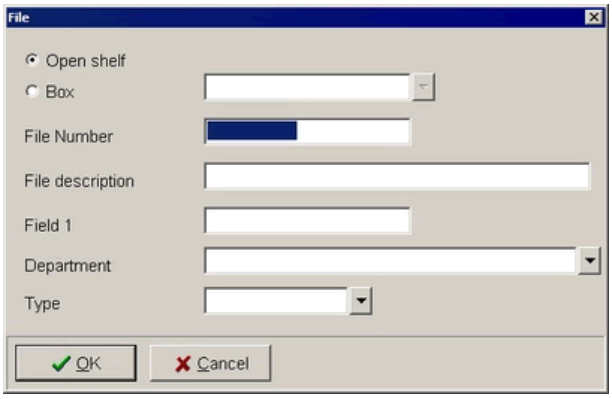
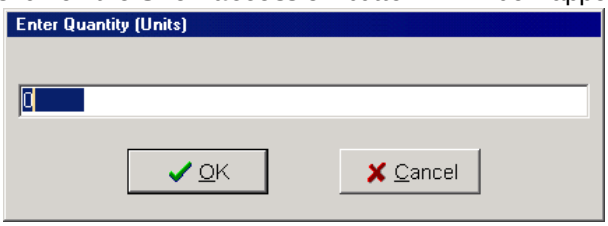


2. Specify whether the file is to be stored in an *Open shelf* location or a *Box*.
- For the **open shelf file**, enter a *number*,a *description*, *a field 1* (optional), a department and a type for the file and press **OK**. As soon as the operation is accepted the shelf file becomes *IN* and may be viewed in the File module.
- For the **in-box file**, choose a box by clicking on the drop-down button at the right of the field and select a box in the list (it will appear highlighted). Enter a number, a description, a field (optional), a department and a type for the file and press OK. As soon as the operation is accepted the shelf file becomes *IN* and may be viewed in the *File module*.

Adding an open shelf accession charge

1. Click on the **Shelf accession** button. A window appears.

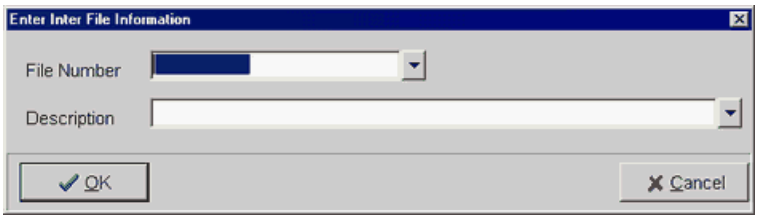


2. Enter the desired shelf accession quantity and press **OK**. This quantity of files will be added to the return items on the delivery for invoicing.

Inter-filing documents into inventoried files

Customers may return documents that belong within existing inventoried files, for example if a file was ordered and returned, but some of the documents from the file were initially kept at the customer site.

1. Click on the **Inter-Files** button. A window appears.



2. Enter the number or the description of the file where the sheets are inserted and press **OK**. Repeat the operation as many times as needed for the same file or for any other file and click on the **Cancel** button when finished.

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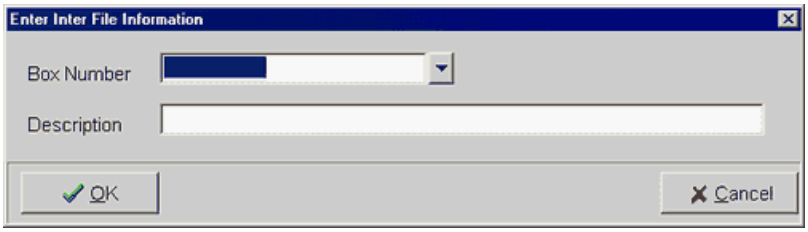
Note : The files must be IN. The inserted sheets will be displayed on the return slip as "Correspondence" and "Inter-filing". Since they lack bar codes, these items must be verified manually 562.

Inter-filing documents into non-inventoried files

1. Click on the **Inter-Files (non tracked) button**. A window appears.



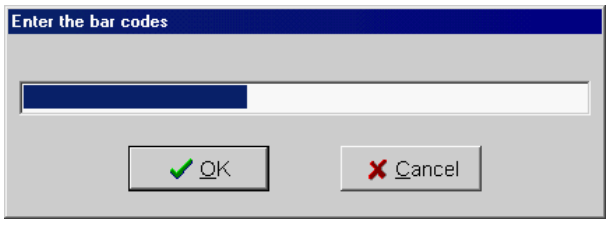
2. Enter the box number where the non track file is stored and the description of the file, and press **OK**. Repeat the operation to insert other pieces into the same box or into any other box.

Note : The boxes must be IN. The inserted sheets will be displayed on the return slip as "Correspondence" and "Inter-filing". Since they lack bar codes, these items must be verified manually 562.

Changing a cardboard box

A cardboard box change can also be performed in the Box module and in the Delivery Billing 617 module. For more information on how this change can be billed to customers, please refer to the Changing the cardboard of a box 321 topic. When a cardboard is changed in the current module, the retrieval rate is not applied.

1. Click on the **Change box cardboard** button. A window appears.



2. Scan or enter the bar code of the first box and press **OK**. The system automatically reprints the label for the new box. Depending on how often the box was handled, the customer may also be charged for a box sale and a reboxing charge.
3. If necessary, scan another box to re-box. Otherwise, click on the **Cancel** button to end the operation.

Printing a bar code label for a new box

1 Click on the Print Thermal Label button. A window appears.

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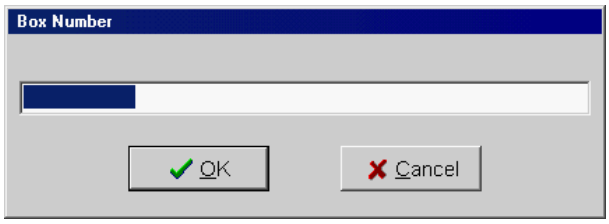


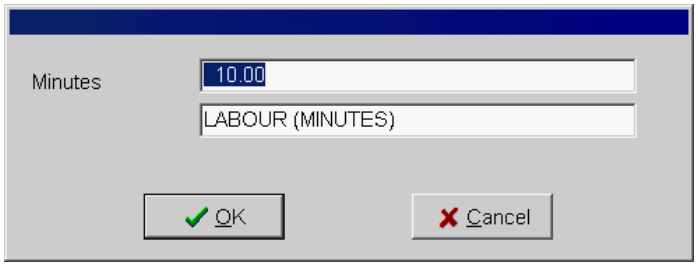
2 Enter the number of the desired box and press OK. The label is automatically printed on the default thermal printer.

Note : This operation can also be performed to reprint damaged labels for boxes already in inventory.

Adding other services to the return

1 Click on the Other button and select either the option Add Labor or Add Notes.
2 According to the chosen option, a different window appears :

- When adding labor, this window appears :



Enter the desired quantity of labor minutes and press OK.

Note : When the customer is billed by department or charge back (settings of the Customer Information module), a window appears previously and asks to enter a department or charge code to be billed for the additional labor.

- When adding notes this window appears :

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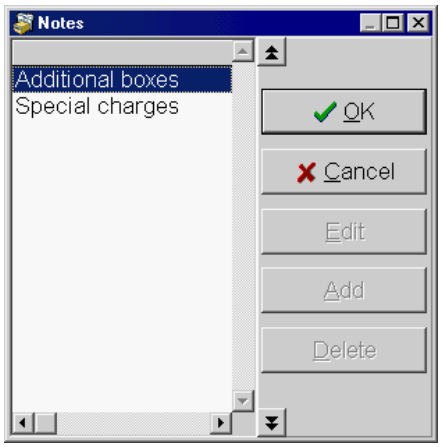

Select the desired notes and press OK. A report's window appears, containing the text of the notes. Edit them if so necessary and press OK when finished. These notes are the ones predefined in the System Information module.

Batch addition of boxes
This operation is similar to the batch addition of boxes through the box module 316, except that delivery and accession charges will be captured.

1. Click on the Other button, and select Batch addition.
2. Place an 'x' beside the fields to be entered (or double-entered) in the batch addition process, then click Okay.
3. Specify the Department and document Type by selecting from the list or typing into the field, then click Okay.
4. If the boxes have preprinted labels, click Yes, otherwise click No.

If yes
- A dialog box asks "Would you like to size the boxes?"
- If you click Yes, you will be prompted to assign a size or select a box type, then click Okay.
- Enter the bar code of the box by scanning it with the wedge scanner, or by typing the bar code and pressing Enter.

If No
- Assign a size or select a box type, then click Okay. A label will be printed after each box.

5. Enter values for the selected fields, and repeat until all boxes of this size, department, and document type have been entered.
6. When done, click Cancel to return to the return deliveries options window.

Displaying the list of the returned items

1. Click on the **View Items** button. A window appears.

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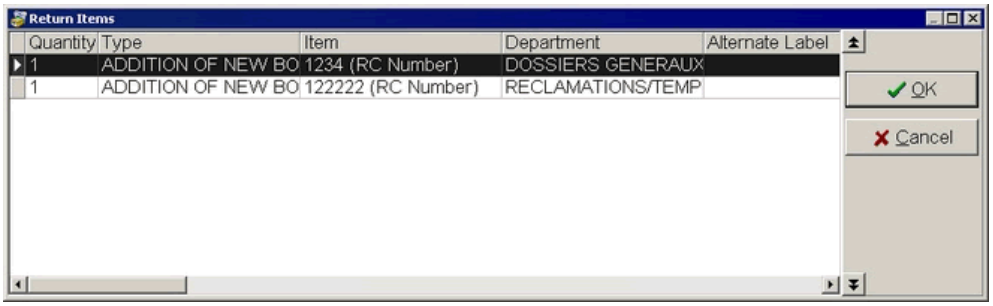


2. Press **OK** to end the operation.

Cancelling the return of items

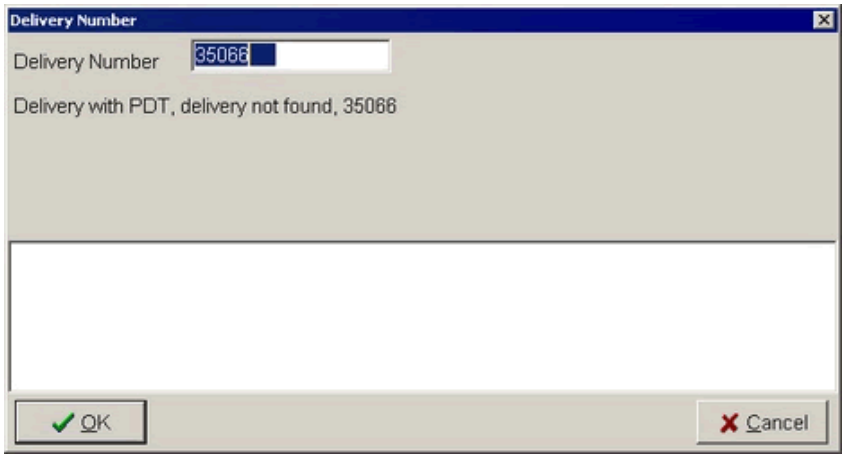
1. Click on the **Remove Items** button. A list of the items appears.
2. Highlight the desired items and press **OK**.

6.6.8.4 Uploading a return from the PDT

Basic returns may also be performed on the PDT and then uploaded. (see the section Returning or adding items with the PDT 1421). To upload this return:

1. Click on **Orders->Return Delivery** from the *Main window*.
2. Prepare the PDT to send the data and click on **File->Upload** list from PDT.
3. When the data transfer is done, a dialog box appears.

- If there is an error in the delivery number, a window appears



4. Enter the right delivery number and press **OK**.

If the data uploaded from the PDT indicates to the system that all the items have been delivered or returned and scanned properly

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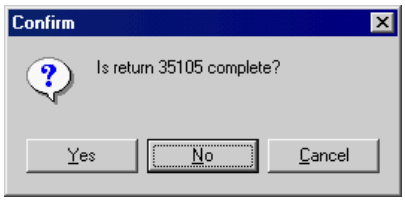
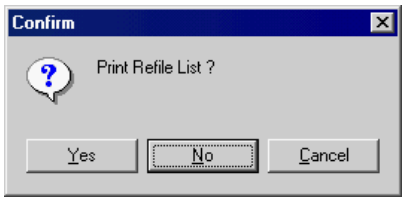


Note : When uploading returned boxes with inventoried files that need to be scanned, a report appears and displays the list of these boxes. The user must then print the report, scan the files in question with the PDT and restart the current operation. He can also return the files manually with the usual way (see the section "Adding or removing items from a return 551").

5. If the return is not complete, click on the **No** button. The system will assume that other items need to be returned. This can be done manually in the current module (see the section "Adding or removing items from a return 551") or with the PDT (see the section "Returning or adding items with the PDT 142").

6. If the return is complete, click on the **Yes** button. Unless there are files that must be scanned in some boxes (a message will appear if that case arises), the delivery is automatically marked as "Returned" and the following dialog box appears.



7. Click on the **Yes** button or on the **No** button, according to the needs. When clicking on Yes, it starts the printing of the refile list and return slip for the delivery in question. The items can then be refiled with the PDT (see the section "Refiling items with the PDT 145") and also manually, with the creation of a refile list in EDC (see the section "Creating or resetting a refile list 559").

6.6.8.5 Downloading files to refile with the PDT

For efficiency, record centers frequently move returned files to bins labeled as file transit locations, until it is convenient to refile them in batches.

To prepare a refile list using the PDT:

1. On the PDT, select **3-Processing->5-File refile**, then scan the file barcodes (see Refiling items with the PDT 145 for details)
2. Open the **Orders->Return Delivery** module, and select **File->File refile with PDT**. A window indicates that EDC RC is downloading information.
3. Connect the PDT to the system via cradle or cable, and press the Enter (ENT) button on the PDT to send the file barcodes and receive the corresponding refile list with boxes and locations.

If errors occur, these should be handles and soon as possible and marked as reconciled 576 in the Orders->Delivery Maintenance module.

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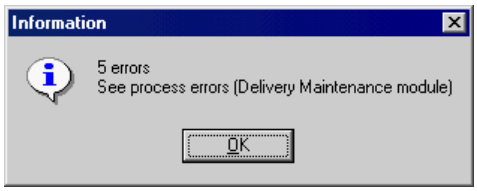
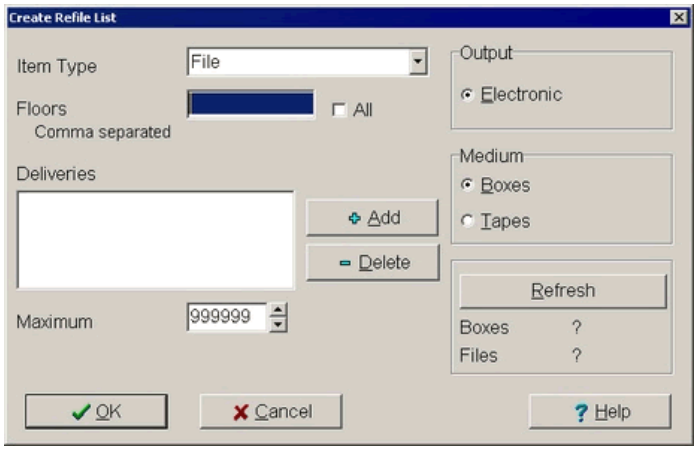


6.6.8.6 Creating or resetting a refile list

Creating a refile list

1 Click on **Orders**->**Return Delivery** from the *Main window*.
2 Click on **File**->**Create Refile List**. A window appears.



Item Type : this field allows to select the document type to include on the refiling list (Box | File | Open shelf file.)
Floors, comma separated : this option is only viewable when the "File" or "Open Shelf File" values has been chosen previously. It allows to determine on which floors at the record center the refile can be done. This option is a deciding factor when the system scrolls the available locations.
Deliveries : by clicking on the **Add** and **Delete** buttons, it is possible to establish a list of the deliveries that will be included on the refile list.
Maximum : this field allows to enter the maximum quantity of items that can be added on the refile list. When the quantity of items to be returned for the selected deliveries is more important than the maximum, the system will stop to add items on the list. It will then be necessary to create another list to complete the refiling.
Output : indicates if the list will be electronically produced (downloaded to the PDT[732]) or printed on paper.
Medium : for refile lists that only include boxes, it allows to specify if these boxes contain files or are magnetic tapes (box is used as tape). This option is very important since boxes and tapes do not have the same volume, are not stored in the same conditions and may not be refiled in the same locations.
Refresh : indicates how many boxes, files or tapes have to be refiled, in accordance with the parameters previously selected. These quantities can change if another user is presently returning other documents on some of these deliveries so that it will be necessary to click on the **Refresh** button to guaranty that all the related items will be included on the refile list.

3 Enter the desired parameters in the appropriate fields and press **OK** to send the list. A message

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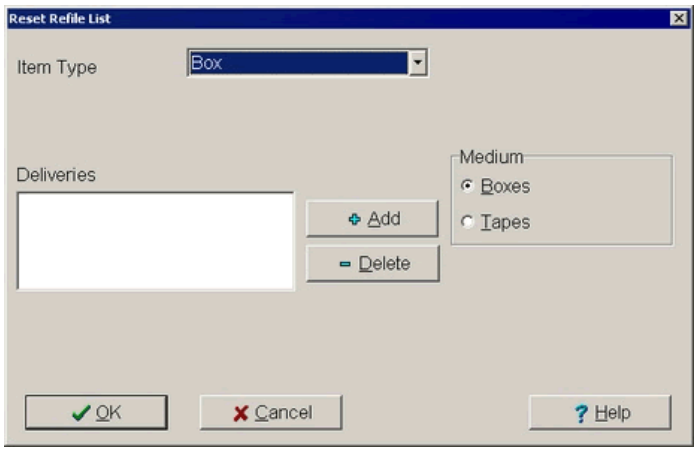
prompts you to prepare the PDT. Do as prompted and press **OK**.

4 Proceed to the refiling 145 of the items and verify the result in the *Return Verification* 561 module.

Resetting a refile list

This operation is used when a refile list has been created, but has to be reset for some reason.

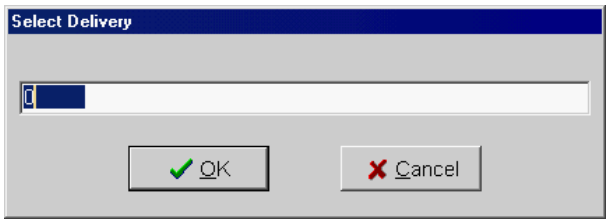
1 Click on **Orders**->**Return Delivery** from the *Main window*.
2 Click on **File**->**Reset Refile List**. A window appears.



3 Enter the desired parameters in the appropriate fields (see the previous operation for more details) and press **OK**.

6.6.8.7 Viewing or printing the return slip and the refile list for a delivery

1 Click on **Orders**->**Return Delivery** from the *Main window*. A window appears instantly.



2 Since a return does not have to be returned, click on the **Cancel**, in order to have access to the other options of the module.
3 Click on **File**->**View Return Slip**|**Print Return Slip**|**View Refile List**|**Print Refile List**. The window opened in **1** appears again.
4 Enter the desired delivery number and press **OK**. The chosen slip or list is automatically produced.

6.6.8.8 Finding the return delivery of an item

This operation can be useful in some extreme situations. For example, a document was missed when refiling delivery items and the record center lost some information (ex: the number of the return it belongs to). The current module can help to track the return and to refile the document properly.

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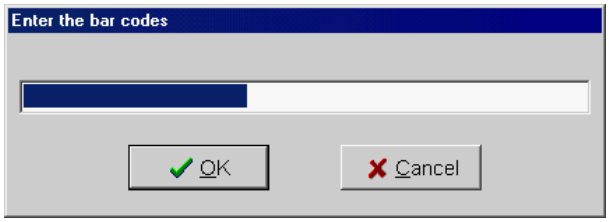
1 Click on **Orders**->**Return Delivery** from the *Main window*. A delivery choice window appears.
2 In order to have access to the other module's options click on the **Cancel** button.
3 Click on **File**->**Find Return Delivery**. A window appears.



4 Enter the bar code of the document and press **OK**. A message box appears and indicates the delivery number and date when the item was returned.
5 When the information has been successfully consulted, press **OK**.

6.6.9 Return Verification

6.6.9.1 Overview (Return Verification)

The return verification essentially allows to guaranty that inventoried or non track files are refiled in the right box. It is possible to proceed by delivery or by using the out cards (an out card is inserted in the box when a file goes out of the record center - the File Out card 234 option has to be set to yes in the Customer Information module).

Available reports
- list of returns that are not verified
- list of items that are not verified

Fields (None)

Tasks
- Manually verifying returns 562
- Uploading refile results from the PDT 563
- Uploading a move list from the PDT 563
- Viewing or printing returns that are not verified 563
- Viewing or printing items that are not verified 563

Distinctive menu options:

File menu
- Manual verification 562
- Upload refile results 563
- Upload move list 563
- View | Print not verified returns 563
- View | Print items not verified 563
- View items in location 563
- Display item location 564

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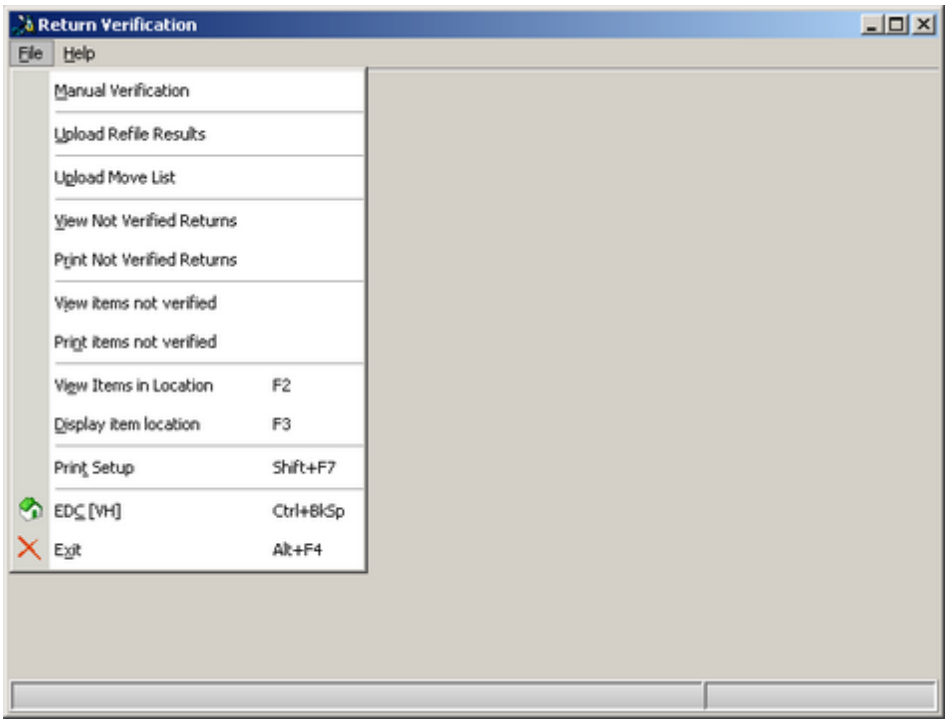
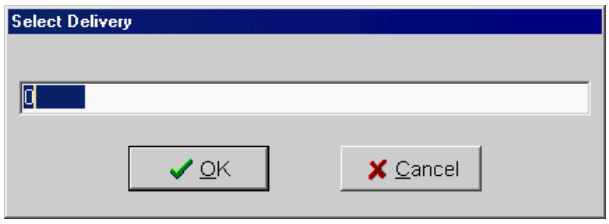
Module window:



6.6.9.2 Manually verifying returns

This operation allows to manually verify the delivery items whose bar code labels cannot be read (labels that come unfixed, lost, damaged).

1. Click on **Orders**->**Return Verification** from the *Main window*.
2. Click on **File**->**Manual Verification**. A window appears.



3. Enter a delivery number and press **OK**. A new window opens and indicates all the return items included on that delivery.
4. Select an item (it will appear highlighted) and click on the **Verify** button. The item is automatically considered as being verified and properly returned in the system.

Note : The "Verified" mention appears in front of the item previously selected.

5. Repeat the previous operation as many times as desired and press **OK** when finished. A message will appear to indicate how many items are still not verified on this delivery, should the occasion arise.

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6.6.9.3 Uploading refile results from the PDT

This operation allows to upload, to a workstation, the refiling results of items processed with the PDT.

1. Click on **Orders**->**Return Verification** from the *Main window*.
2. Prepare the PDT to send the data (see the section "Refiling items with the PDT 145") and click on **File**->**Upload Refile Results**.
3. When the data transfer is done, the state and location of the items are updated in the *Box* and *File* module. When there are process errors, a message appears. These errors can be reconciled in the *Delivery Maintenance* module (see Reconciling process errors 576).

6.6.9.4 Uploading a move list from the PDT

This operation allows to upload the items moved directly with the PDT or included in an internal transfer list and processed with the PDT.

1. Click on **Orders**->**Return Verification** from the *Main window*.
2. Prepare the PDT to send the data (see the section "Moving or removing items with the PDT 108") and click on **File**->**Upload Move List**.
3. When the data transfer is done, a report appears and displays the process errors. (see Reconciling process errors 576).The history and location of the items are updated.

6.6.9.5 Viewing or printing returns and items that are not verified

Viewing or printing the list of not verified returns

1. Click on **Orders**->**Return Verification** from the *Main window*.
2. Click on **File**->**View Not Verified Returns**|**Print Not Verified Returns**. A window appears and asks to enter an interval of delivery dates.
3. Enter the desired interval and press **OK**. The report is automatically printed or displayed.

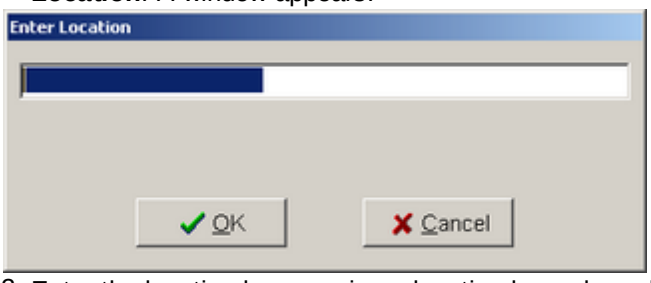
Viewing or printing the list of not verified items

1. Click on **Orders**->**Return Verification** from the *Main window*.
2. Click on **File**->**View items not verified**|**Print items not verified.** A window appears and asks to enter an interval of deliveries.
3. Enter the desired interval and press **OK**. The report is automatically printed or displayed.

6.6.9.6 Listing items in a location

To view a list of items that are currently recorded in a location:

1. From the menu of the **Orders->Return verification** module, select **File->View Items in Location**. A window appears.



2. Enter the location by scanning a location barcode, or by manually entering it and clicking **Ok**.
3. A report lists the items assigned in the system to this location.

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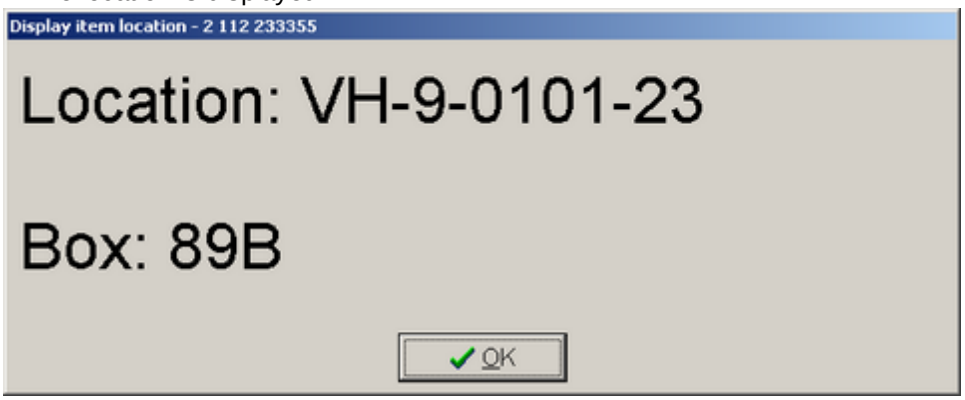
Note: It is easy to accidentally miss scanning a box. When refilling more than a few boxes, it is good practice to scan manageable batches of boxes to a holding location identified by a barcode on a small traffic cone. Once this batch of items have been refilled, it is easy to confirmed that no items were missed, by scanning the cone to verify that the location is empty.

6.6.9.7 Displaying the location of a scanned item

To quickly view the location of an item:

1. From menu of the **Orders->Return Verification** module, press **F3** or select **File->display item location**.
2. Scan or manually enter the barcode.
3. The location is displayed.



6.6.10 Non Track File

6.6.10.1 Overview (Non Track File)

When a customer orders a file that has not been previously inventoried, a temporary record is created. If the file is found, it is automatically inventoried as a permanent file. If the file is not found, it is excluded, and the non-track file is recorded in this module.

Available reports

- list of all non track files
- list of non track files for one customer)

Fields 565 **(see the next section)**

Tasks

- Removing a non track file from inventory 565
- Viewing or printing a list of all the non track files 566

Distinctive menu options: (None)

Module window:

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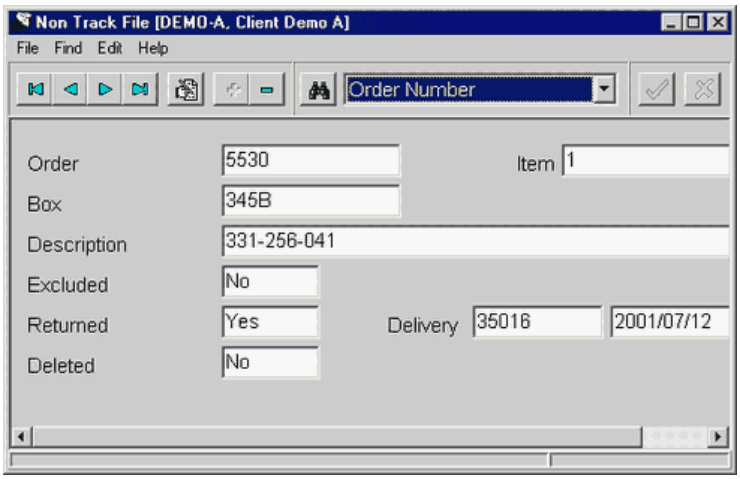

6.6.10.2 Fields (Non Track File)

Order
This field indicates the number of the order on which the file was placed.

Item
This number identifies the position of the file on the order.

Box
It is the number of the box where the file was searched.

Description
This is the description entered in the order to find the file.

(Excluded)
When this field indicates "Yes" it means that the file has not been found; so that the file has been excluded from the order and has not been sent to the customer. (This will is "Yes" for all new files.)

(Returned)
When this field indicates "Yes" it means that the file has been found (the previous field may indicate "No"); so that the file has been sent to the customer and has been returned to the record center.

(Deleted)
When this field indicates "Yes" it means that the file will never come back to the record center and has been deleted from the inventory.

(Delivery)
This field indicates on which delivery the file was sent to the customer, should that occasion arise.

(Delivery Date)
This field indicates the date when the file was delivered.

Note: Fields in brackets are largely obsolete due to changes in *EDC RC*.

6.6.10.3 Removing a non track file from inventory

This operation is performed when the record center is advised that a non track file will never come back to the storage area. It is then necessary to remove the out card from the box that contained

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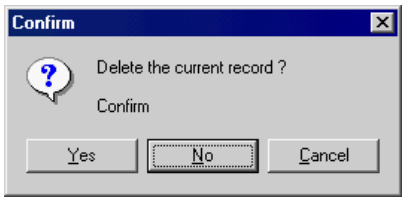
the file and also to delete the file from the system.

Note: this applies to records created with earlier versions of EDC RC

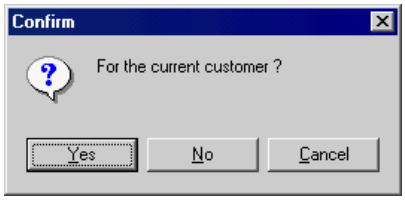
1. Click on **Orders->Non Track File** from the Main window.
2. Find the file and click on **Edit->Delete**. A dialog box appears.



3. Click **Yes** to confirm the deletion. The content of the *Deleted* field becomes "*Yes*".

6.6.10.4 Viewing or printing the list of non track files

1. Open the **Orders->Non Track File** module.
2. From the menu, select **File->View Report|Print Report**. A dialog box appears.



3. Click **Yes** to produce a report for a specific customer or click **No** to include all customers.

6.6.11 Shelf Non Track File

6.6.11.1 Overview (Shelf Non Track File)

Sometimes, non track files are stored on open shelves instead of boxes. This module presents information about auto inventoried files that were ordered but not found. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Available reports
- list of all non track files on open shelf

Fields567 **(see the next section)**
- None. (See the *Report*364 module)

Tasks
- Viewing or printing the list of all non track files on open shelf567

Distinctive menu options: (none)

Module window:

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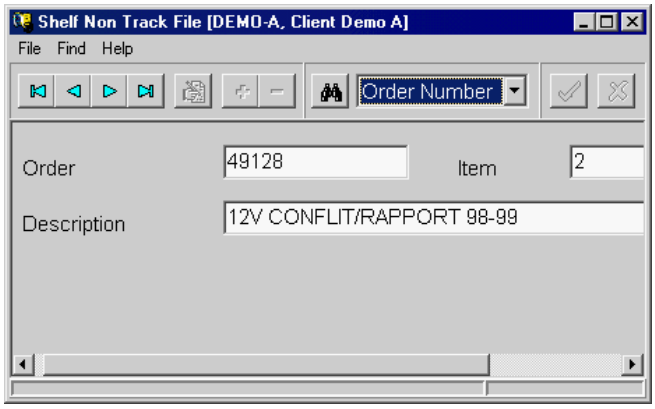


6.6.11.2 Fields (Shelf Non Track File)

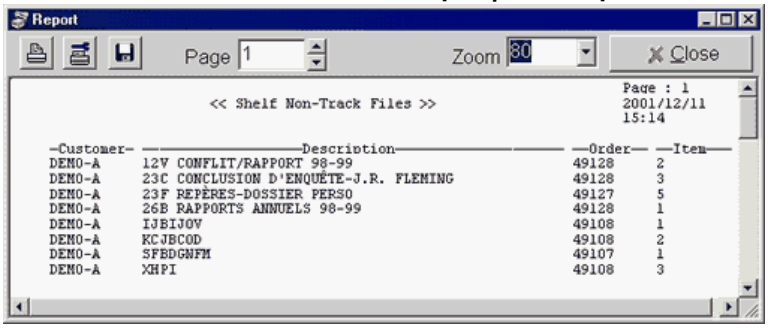
Order
This field indicates the order number of the file.

Item
This number identifies the position of the file on the order.

Description
This is the description entered in the order to find the file.

6.6.11.3 Viewing or printing the list of all non track files on open shelf

1. Open the **Orders->Shelf Non Track File** module
2. From the menu, select **File->View Report|Print Report**.



6.6.12 Delivery Imaging

6.6.12.1 Overview (Delivery Imaging)

Delivery slips provide an important record of the delivery, including the time that it is occurred, the name and signature of recipient, and their initials acknowledging any change to the delivery, such as changes in the number of boxes returned, and any additional labor charges.

The delivery imaging module enables record centers to scan these slips and automatically associate them with the correct delivery, for reference by the record center. Customers can also access the slips for their own deliveries over ActiveWeb.

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Available reports
- Deliveries not imaged (for date range)

Tasks
- Scanning delivery and return slips 569
- Importing delivery and return slips 570
- Finding a delivery image 571
- Printing delivery images 571
- Exporting a delivery image 571
- Sending delivery images by Email 572
- Copying the current delivery image 572
- Editing the current delivery image 573

Distinctive menu options:

File menu
- Scan 569
- Select Scanner
- View deliveries not imaged 570
- Import 570
- Export 571
- E-mail 571

Edit menu
- Copy Image 572

View menu
- (various standard options) 572

Image menu
- Rotate 573
- Negative 573

Module window

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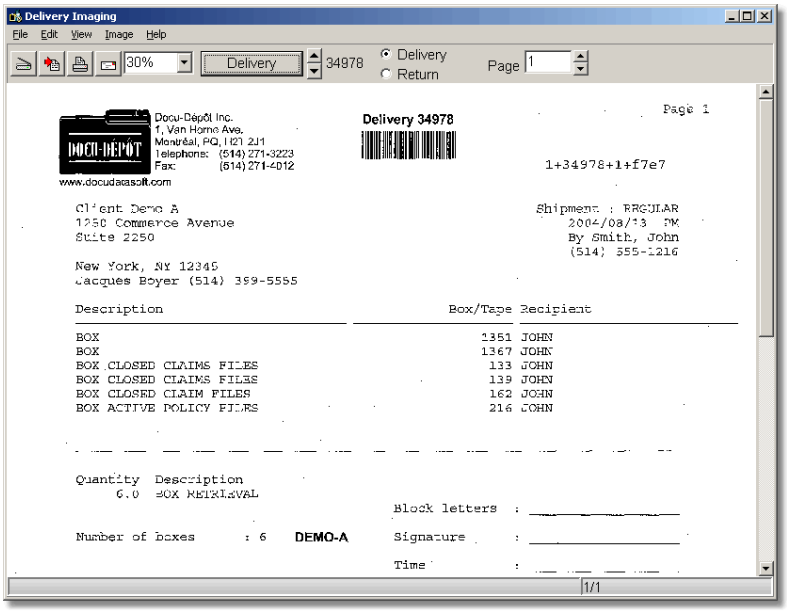


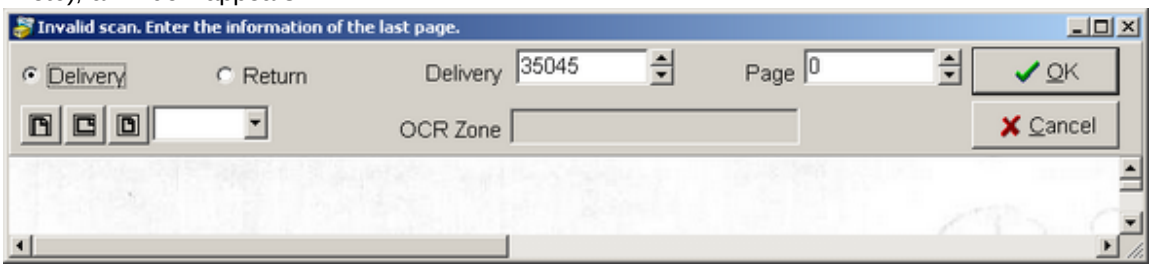
6.6.12.2 Scanning delivery and return slips

1. Click on **Orders->Delivery Imaging** from the *Main window*.
2. Click on **File->Scan**. The scanner interface window appears. This will vary depending on your scanner.
3. Perform the scanning in accordance with the scanner used.

The system automatically recognizes the codes present on every slip (these codes are used to associate a delivery number to each slip).

Note:

4. If When the OCR fails (because of damaged slips, slips not inserted properly in the scanner, etc), a window appears.



5. Check off the option *Delivery* or *Return*, according to the scanned slip. Enter a delivery number and a page number (some slips can have many pages),and press **OK**. (Pressing the '+' or '-' buttons on the number pad will increase or decrease the page number.)

6. The images are saved in the default image directory of the system (settings defined in the System Information module).

It will be possible to consult the delivery images 570 in *EDC RC*, through *ActiveFile*, or via *ActiveWeb*.

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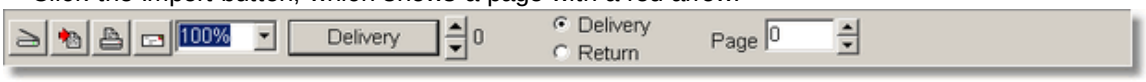
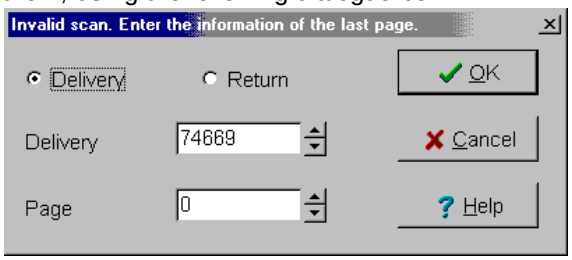
6.6.12.3 Importing delivery and return slips

In addition to scanning delivery and return slip images 569 into the delivery imaging module, it is also possible to import them from TIFF format.

1. From the *Main window*, open the **Orders->Delivery imaging** module.
2. Click the Import button, which shows a page with a red arrow.



3. Navigate to the file that you wish to import, then click **open**.
4. If the slips are recognize, they will be imported automatically and you will be returned to the main screen of the delivery imaging module. If they are not recognized, you will be prompted to identify them, using the following dialogue box:



5. Identify the slip, then click **Okay**.

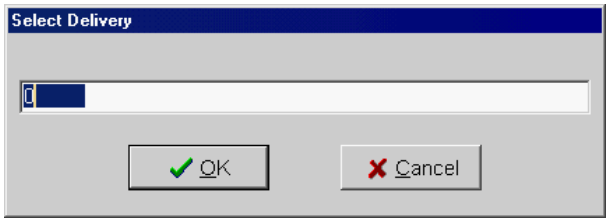
6.6.12.4 Viewing a list of deliveries that have not been imaged

To identify deliveries that do not yet have an imaged delivery slip:

1. Open the Orders->Delivery Imaging 567 module.
2. From the menu, select **File->View deliveries not imaged**.
3. A window prompts you for a range of delivery dates. Enter a **From** date and a **To** date, and click **OK**.
4. The list of deliveries not imaged for those dates appears.

6.6.12.5 Finding a delivery image

1 Click on **Orders->Delivery Imaging** from the *Main window*.
2 Click on the **Delivery** button from the button bar. A window appears.



3 Enter the searched delivery number and press **OK**. If the slips for this delivery have been scanned properly, an image is supposed to be displayed on the screen. The delivery number in question will appear beside the *Delivery* button. It is then possible to perform some operations from the button bar :

- Click on the choice buttons located to the right of *Page*, in order to display the other images for this delivery, should the occasion arise.
- Check off the option *Delivery* or *Return*, in order to view respectively the delivery or return slips.
- Click on the choice buttons located to the right of the *Delivery* button, in order to scroll slips

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for other deliveries.

6.6.12.6 Printing delivery images

This operation allows to print all the pages for the current slip.

1. Click on **Orders**->**Delivery Imaging** from the *Main window*.
2. Find the desired image 570, keep it on the screen and click on **File**->**Print**. A window appears and asks to enter an interval of pages.
3. Enter the desired interval and press **OK**. The images will be automatically printed from the default printer.

Note : The parameters for printing can be modified by clicking on **File**->**Print Setup** from the current module.

6.6.12.7 Exporting a delivery image

This operation allows to export only the current image.

1. Click on **Orders**->**Delivery Imaging** from the *Main window*.
2. Find the desired image 570, keep it on the screen and click on **File**->**Export**. A window appears (different for each computer.)
3. Choose a directory for the exportation, enter a file name and accept the operation. The image is automatically exported and the system goes back to the module's Exporting a delivery image 571 window.

6.6.12.8 Sending delivery images by Email

This operation allows to send all the pages for the current slip.

1. Click on **Orders**->**Delivery Imaging** from the *Main window*.
2. Find the desired image 570, keep it on the screen and click on **File**->**Email**. A window appears, different for each operation.

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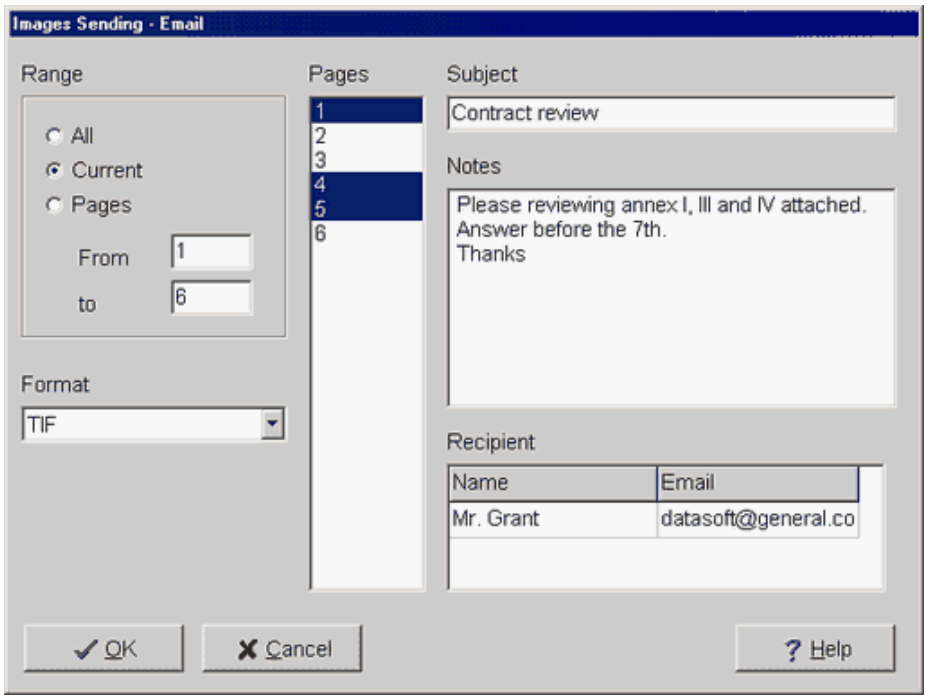

3 Select the pages that must be sent. Enter a subject and notes if so desired, then enter a recipient and an email address in the appropriate fields. Choose a file format (TIFF, PNG, PDF) and press **OK** to send images.

Note : When sending images by mail, the SMTP address of the record center must be set before in the *System Information* 205 module. Select the one desired and press **OK**. The images will automatically be sent.

6.6.12.9 Copying the current delivery image

1 Click on **Orders**->**Delivery Imaging** from the *Main window*.
2 Find the desired image 570, keep it on the screen and click on **Edit**->**Copy Image**. The image is then copied temporarily in the computer clip board.
3 Open any program for image treatment and paste the image in question. This image could then be saved and used later on demand (sending it by mail as an attachment, printing it, etc).

6.6.12.10 Viewing an image

Many options are offered when viewing an image; one can smooth a black and white image as well as adjust the size of the image viewed.

Smoothing out a black and white image

1 Click on **Image** from the *Imaging* module.
2 Click on **View -> Anti aliasing**
3 The image will automatically be smoothed out.

Note: Only images in black and white in the bmp format can be smoothed out.

Changing the size of the image

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1 Click on **Image** from the *Imaging* module.
2 Click on **View -> Actual Size | Fit width | Fit height | Full page**
3 The image will automatically be sized properly.

6.6.12.11 Editing the current delivery image

1 Click on **Orders**->**Delivery Imaging** from the *Main window*.
2 Find the desired image 570, keep it on the screen then click on **Image**. Select one of the following menu options :

- **Rotate**->**90 degrees**|**180 degrees**|**270 degrees**.
  This option allows to rotate the image (90°,180° or 270°), in order to display it in the desired position. It is useful when a document has been scanned on the wrong side and cannot be read on the screen. It is then not necessary to scan this document again.

- **Negative**
  This option allows to display the negative. The black and white characters are then reversed.

6.6.13 Deleted Order Item

6.6.13.1 Overview (Deleted Order Item)

If an order is not yet picked, it is possible to remove items or delete the order at the request of the customer. This module registers these items, along with the time and date of deletion, and the employee who processed it. Such information can be useful in tracing why a customer may have failed to receive an item.

Available reports
- None. (See the *Report* 364 module)

Fields 574 **(see the next section)**

Tasks
- Searching a deleted order item 574
- Scrolling the list of deleted orders 575

Distinctive menu options: (None)

Module window:

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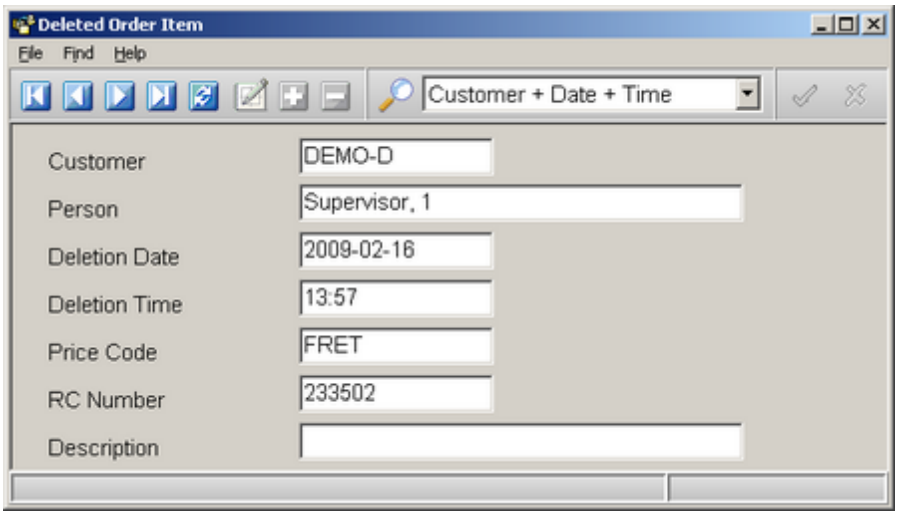


6.6.13.2 Fields (Deleted Order Item)

Customer
The Customer Key 225 of the customer associated with the order.

Person, Deletion Date, Deletion Time
The employee who removed the item or delete the order, and the date and time. This may help you to trace back the circumstances that led to the order item being deleted.

Price Code
Price code associated with the deleted item. For example, a file retrieval price code will appear if the order was for a file from a box.

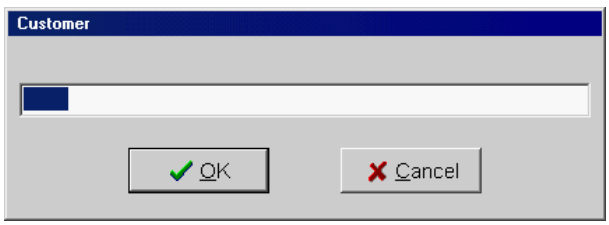
RC Number
For boxes or files, the RC number 311 identifying the deleted item. This is assigned to the system when the box or file record is created.

Description
Description of the deleted item. The source of this description depends on the type of item or service.

6.6.13.3 Searching a deleted order item

This operation allows to find a specific deleted order item by entering the customer's code, the approximate date and the approximate time of the potential deletion.

1 Click on **Order**->**Deleted Order Item** from the *Main window*.
2 Click on **Find**->**Find**. A window appears.



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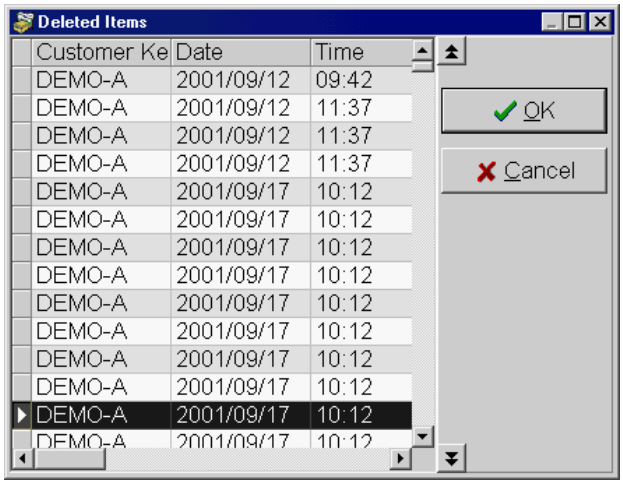
3 Enter the code of the desired customer and press **OK**.
4 Enter an approximate date and time for the deletion and click on the **Accept** button. The system displays the first item that has been deleted on the date and time previously entered, or any closed record. It is possible to view the other items by using the navigation shortcuts 25.

6.6.13.4 Scrolling the list of deleted orders

Scrolling the deleted order items allows to view rapidly all the records.

1 Click on **Order**->**Deleted Order Item** from the *Main window*.
2 Click on **Find**->**Scroll**. A window appears.



3 Press the **Up Arrow** or the **Down Arrow** to scroll the list and press **OK** when finished.

6.6.14 Delivery Maintenance

6.6.14.1 Overview (Delivery Maintenance)

The *Delivery Maintenance* module supports management and maintenance related to the order fulfillment process. Access to this module is typically reserved for supervisors.

Available reports
- Deliveries not delivered (for a specific period) 582
- Items not delivered (for a specific period) 582
- Process errors for a specific period) 582

Fields (see the next section)
- None. (See the *Report* 364 module)

Distinctive menu options:

File menu
- Reconcile process errors 576

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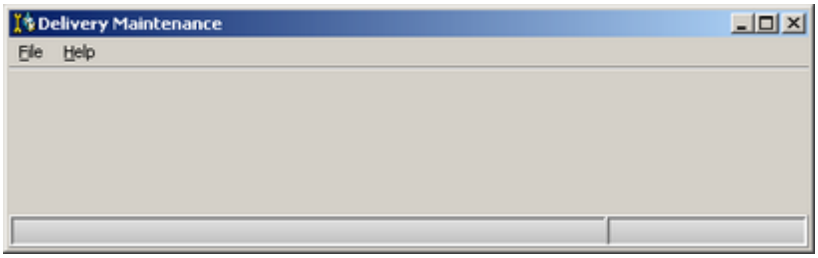
- Re-open a delivery for return 577
- Unlocking an order 577
- Change delivery type 577
- Change delivery building 578
- Set delivery delivered 579
- Set delivery verified 579
- Automatic verification 578 (of multiple return deliveries)
- Pager options 580
- Daily tasks 580
- Daily tasks for all buildings 580
- Set AM/PM for tape schedule 581

Module window:

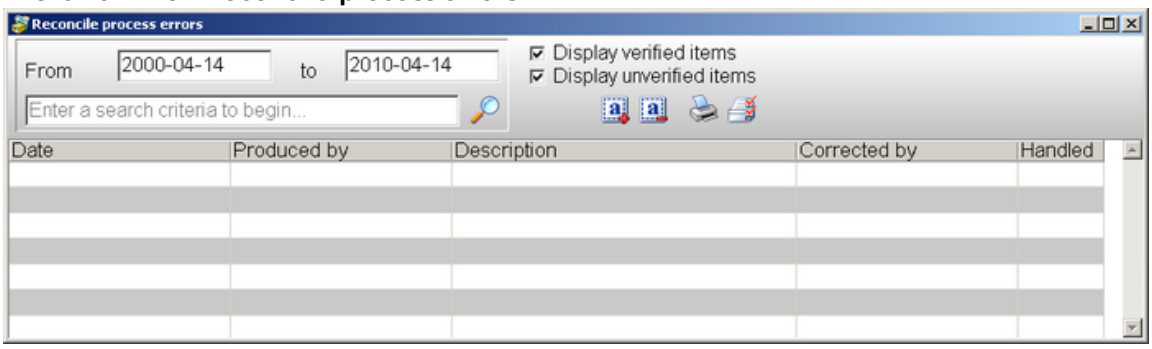


6.6.14.2 Reconciling process errors

If there is an error in processing items while moving inventoried items around the record center and on deliveries, EDC RC produces error messages so that the errors can be fixed. It is important to reconcile these in a timely manner, so that your inventory and billing will be correct.

This interface enables you to view process errors and verify that they have been handled.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Reconcile process errors**



- In the *From* and *To* fields, enter a date range over which to view errors, then click the search glass icon.
- You may limit results by entering search criteria, such as an employee name.
- To display only error that have not yet been handled, ensure that only the "Display unverified items" box is checked.
- To mark errors as verified error, highlight the errors and press [Space]. Pressing the a+ icon will select all times.

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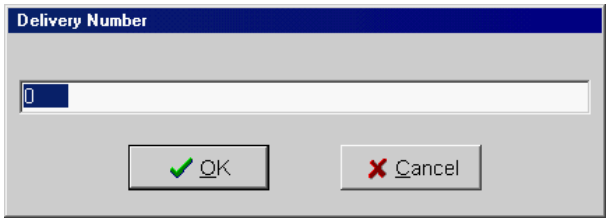
6.6.14.3 Reopening a delivery for return

This operation can be useful, especially when a wrong quantity of boxes was returned. When reopening a return, the error can be corrected. This procedure will guaranty the refilling and the billing of the boxes. These errors are generally noticed only when verifying returns.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Re-Open Delivery For Return**. A window appears.

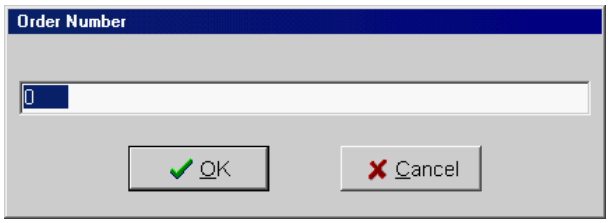


3 Enter the delivery number in question and press **OK**. The system automatically updates the status of the delivery that becomes again CLOSED.

6.6.14.4 Unlocking an order

When an order is being accessed, it is locked by the system in order to prevent that two different users try to access that order at the same time. If a computer failure occurs during the processing, the order stays locked when the system restarts. This operation allows then to unlock the order and complete its process.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Unlock Order**. A window appears.



3 Enter the order number in question and press **OK**. The system automatically unlocks the order that can be edited for modification and normally processed.

6.6.14.5 Changing a delivery type

The current operation allows to change a delivery type, especially when it is necessary not to overcharge a customer for a rush delivery that was delivered late.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Change Delivery Type**. A window appears.

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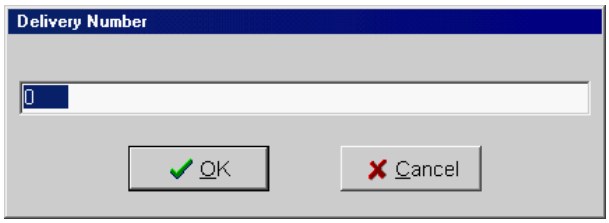


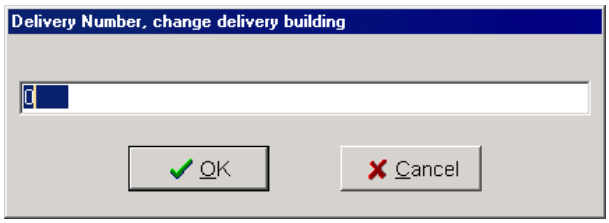
3 Enter the delivery number in question and press **OK**. A list containing all the delivery types defined in the system and granted to the customer is displayed.
4 Select the desired delivery type and press **OK**. The system automatically updates the delivery.

Note : When choosing a delivery type with delivery delays, a message appears and asks if the delivery time must be calculated from the current time.

6.6.14.6 Changing a delivery building

Under some circumstances, a delivery can be created without a destination building. The current operation allows to select or change the building for any delivery.

1 Click on **Orders->Delivery Maintenance** from the *Main window*.
2 Click on **File->Change Delivery Building**. A window appears.

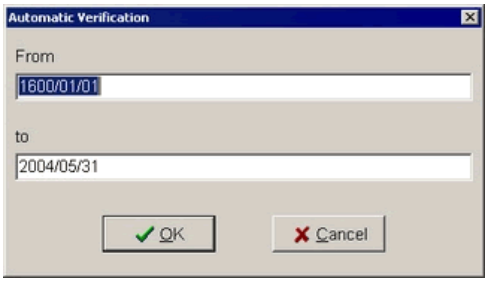


3 Enter the delivery number in question and press **OK**. A list containing all the buildings of the record center is displayed.
4 Select the desired building and press **OK**. The system automatically updates the delivery.

6.6.14.7 Automatically verifying returns

Returns go to the verified state once all items on them have been moved to a permanent location. A report of unverified returns can be seen in the Return Verification 561 module. This is a useful tool in ensuring that all record center work is systematically completed. The present function should only be used with great caution, as it causes the specified returns to be marked as verified, without the items being scanned to final locations.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Automatic Verification**. A window appears.



3. Select a range of delivery dates to verify and press **OK**

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4. If you wish to verify deliveries for a specific customer, click **Yes** and enter the customer key. Otherwise click **No**.

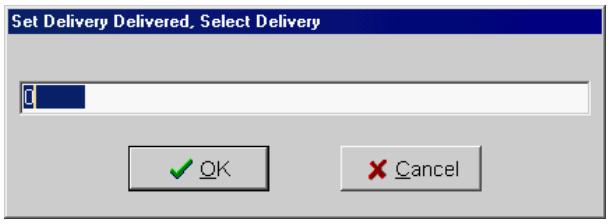
The software will automatically verify all the returns for the specified customer(s) within the date range selected.

6.6.14.8 Marking a delivery as delivered

The current operation allows to indicate that all the items included on a delivery have been delivered properly.

This operation is essential for customers who do not use the *Delivery with PDT* 732 option, or for exceptional circumstances when the PDT fails during a delivery.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Set Delivery Delivered**. A window appears.



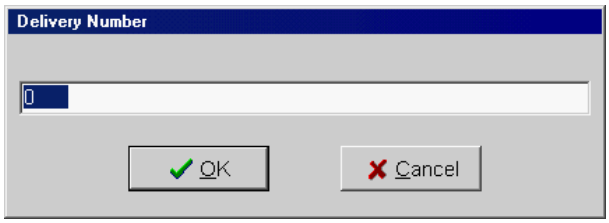
3 Enter the number of the wanted delivery and press **OK**. The state of the delivery in question automatically becomes DELIVERED.

Note : Only the CLOSED deliveries can be set as delivered.

6.6.14.9 Marking a delivery as verified

Normally, deliveries are verified in the *Return Verification* 561 module. But sometimes, it can be necessary to manually indicate that all the items have been verified without performing the entire return verification process. This can be useful when a delivery has been returned and verified but, for some reasons, not registered in the system.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Set Delivery Verified**. A window appears.



3 Enter the delivery number in question and press **OK**.

Note : Only the RETURNED deliveries can be verified. If they have not been returned, an error message will appear and the current operation will not be accepted.

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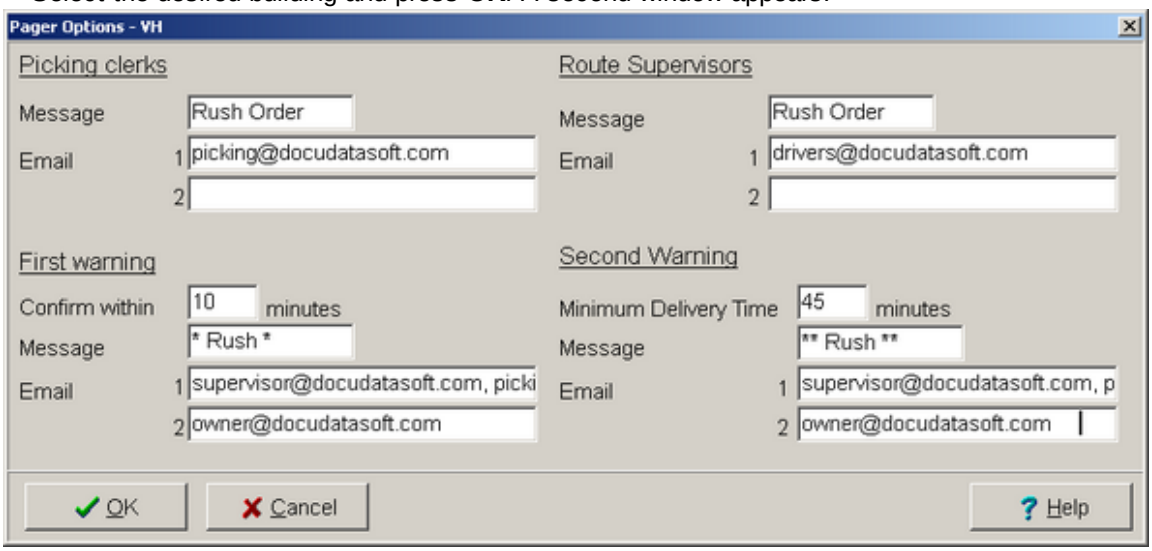
6.6.14.10 Setting pager options

Some deliveries are set by delay and must be delivered in a short time. When orders are placed with these delivery types, they are automatically grouped. EDC sends notifications to specified e-mail addresses (some of which may be associated to pagers or cellular phones) indicating the order number to be picked as well as the specified message and the delivery deadline time.

Note : The warning margins before and after the working hours of the record center are established in the System Information module.

1. Open the **Orders->Delivery Maintenance** module.
2. From the menu, select **File->Pager Options**.
3. Select the desired building and press **OK**. A second window appears.



4. Set **messages**, **e-mail** addresses, and **time thresholds** for each situation as follows: (Note that multiple e-mail addresses may be separated by commas on the same line.)

Picking clerks and Route supervisors:
These messages are sent as soon as the order is confirmed, notifying the picking clerk that an items is to be picked, and the route supervisor that a vehicle will be required to perform the delivery

First warning:
This message is sent after the specified number of minutes if the picking list for this order has not yet been sent to a PDT. This might occur if the picking clerk is in an area of the building that does not have good wireless reception.

Second warning:
This is sent if the picking is not completed and results uploaded within the specified time of the delivery deadline. This might occur if there is a problem with the picking, or if neither the original message nor the first warning were received and acted on.

5. Click the **OK** button once done.

6.6.14.11 Establishing daily tasks

This operation allows the record center to evaluate the tasks that have to be performed, the labor time and how many people may have to work that day. This report can be run for the current building or for all buildings

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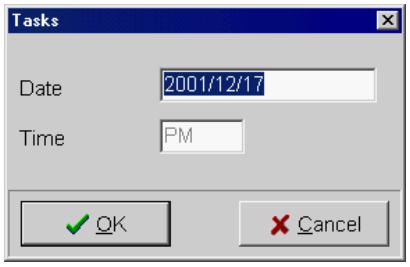
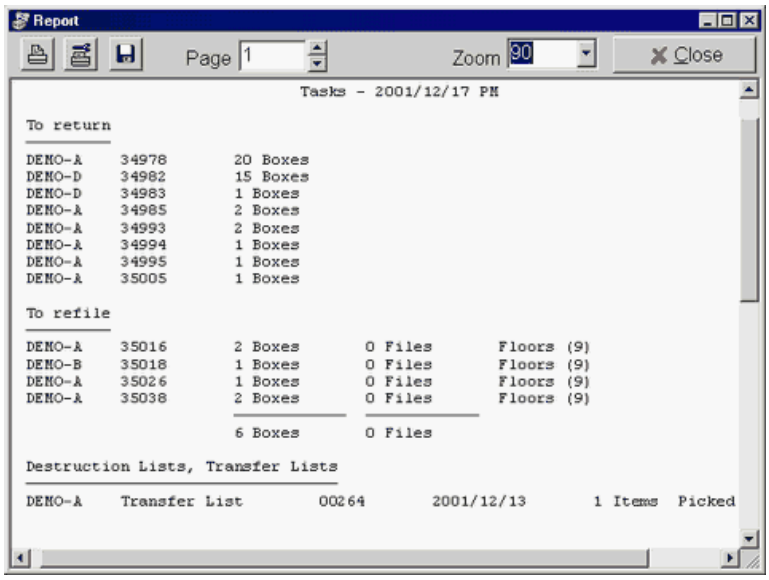
1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Daily Tasks | Daily Tasks for All Buildings**. A window appears.



3 Enter the date and moment (AM or PM) in question and press **OK**. A report's window appears.


Report
Page 1
Zoom 90
Close
Tasks - 2001/12/17 PM
To return
DEMO-A 34978 20 Boxes
DEMO-D 34982 15 Boxes
DEMO-D 34983 1 Boxes
DEMO-A 34985 2 Boxes
DEMO-A 34993 2 Boxes
DEMO-A 34994 1 Boxes
DEMO-A 34995 1 Boxes
DEMO-A 35005 1 Boxes
To refile
DEMO-A 35016 2 Boxes 0 Files Floors (9)
DEMO-B 35018 1 Boxes 0 Files Floors (9)
DEMO-A 35026 1 Boxes 0 Files Floors (9)
DEMO-A 35038 2 Boxes 0 Files Floors (9)
6 Boxes 0 Files
Destruction Lists, Transfer Lists
DEMO-A Transfer List 00264 2001/12/13 1 Items Picked

4 Click on the **Print** button to produce a paper list of these tasks and click on the **Close** button when finished.

6.6.14.12 Set AM/PM in Tape Schedule

This operation can be useful when a customer wants to change the delivery period (AM/PM) of all his tapes at the same time.

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**Set AM/PM in Tape Schedule**. A window appears.
3 Enter the customer key or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**. Press **OK**.
4 A window appears

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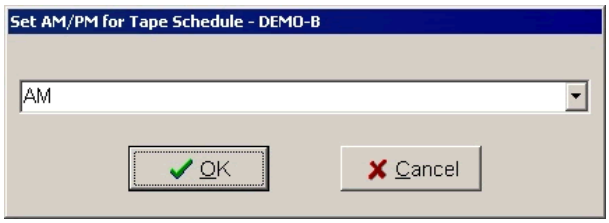
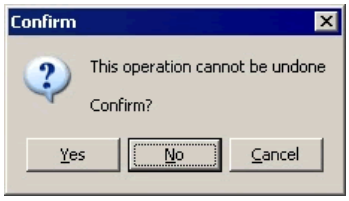


5 Select AM or PM in the drop-down field. Press **OK**.
6 A verification message appears

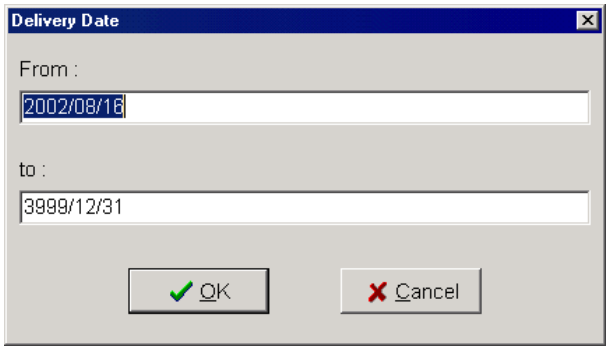


7 To confirm press **Yes.** To abort the entire operation press **No** or **Cancel**.

6.6.14.13 Viewing or printing reports

Producing the report of deliveries not delivered

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**Deliveries not delivered**. A window appears.



3 Enter a delivery date range and press **OK**. The report is automatically displayed or printed. It gives the delivery numbers in question, the delivery dates and delivery states.

Producing the report of items not delivered

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**Items not delivered**. A window appears and asks to enter an interval of deliveries.
3 Enter the desired interval and press **OK**. The report is automatically displayed or printed. It gives the code of the customer in question, the item description, the RC number for files and the box where they are stored, and the delivery number.

Producing the report of process errors

1 Click on **Orders**->**Delivery Maintenance** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**Process Errors**. A window appears and asks to enter an interval of dates.

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3 Enter the desired interval to produce the report and press **OK**. The report is automatically displayed or printed and gives the date, time, employee name and description for each error.

Note that using the process for Reconciling process errors 576 is now the preferred method for working with process errors.

6.6.15 Recurring Orders

6.6.15.1 Overview (Recurring Orders)

This module is used to create recurring orders for line items and shredding container rotation and emptying.
These orders may be scheduled according to a variety of monthly, weekly, and daily patterns.

Recurring orders are generated every day at 9:00 AM, (or after 9 AM if the system is not running at that time), for the subsequent delivery date. For example, if the first scheduled delivery is to be on Wednesday, the recurring order should be created prior to 9 AM Tuesday.

Note: Recurring orders are created with a specific authorized user and delivery type. If the user is made inactive or loses access to this delivery type, the system will be unable to create the order. Therefore, it is good practice to create a user for recurring orders, with access to all available delivery types.

Available reports

- Recurring orders for a customer

Fields 584 (see the next section)

Tasks

- Adding a recurring order 585
- Editing or Deleting a recurring order 588
- Viewing recurring orders for a customer

Distinctive menu options: (none)

Module window

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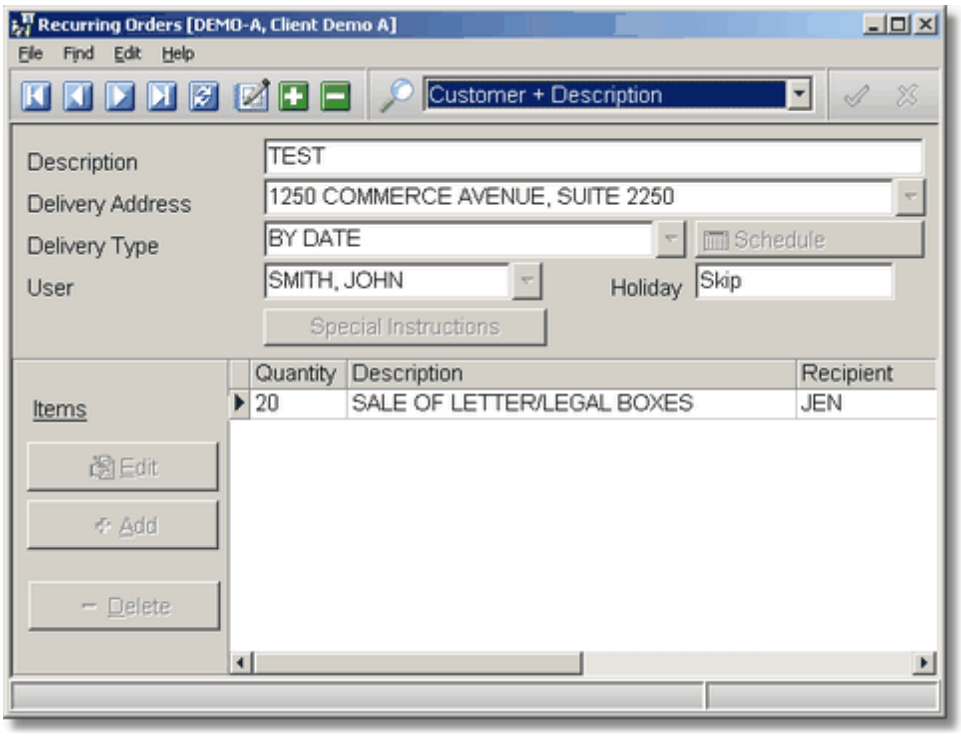

6.6.15.2 Fields (Recurring Orders)

Description
Alphanumerical field that contains the description of the recurring order.

Delivery Address
Drop-down list containing all available delivery addresses for this customer.

Delivery Type
Drop-down list containing all available delivery types for this customer.

Schedule
Button leading to a schedule creator. For more information on how to create a schedule, see the Adding a recurring order 585 topic.

User
Drop-down list containing all the user's of this customer.

Holiday
Choice-field containing the following choices : Skip, Deliver Before, Deliver After.
This field is used to set the software behaviour when the recurring order falls on a holiday or non-business day, it either skips the delivery for that set date or delivers it the day before or after.

Special Instructions
Button to add notes to appear with each scheduled order. These will appear on the delivery slip.

Items

- **Edit** - Button used to edit the list of items.
- **Add** - Button used to add line items to the recurring order.

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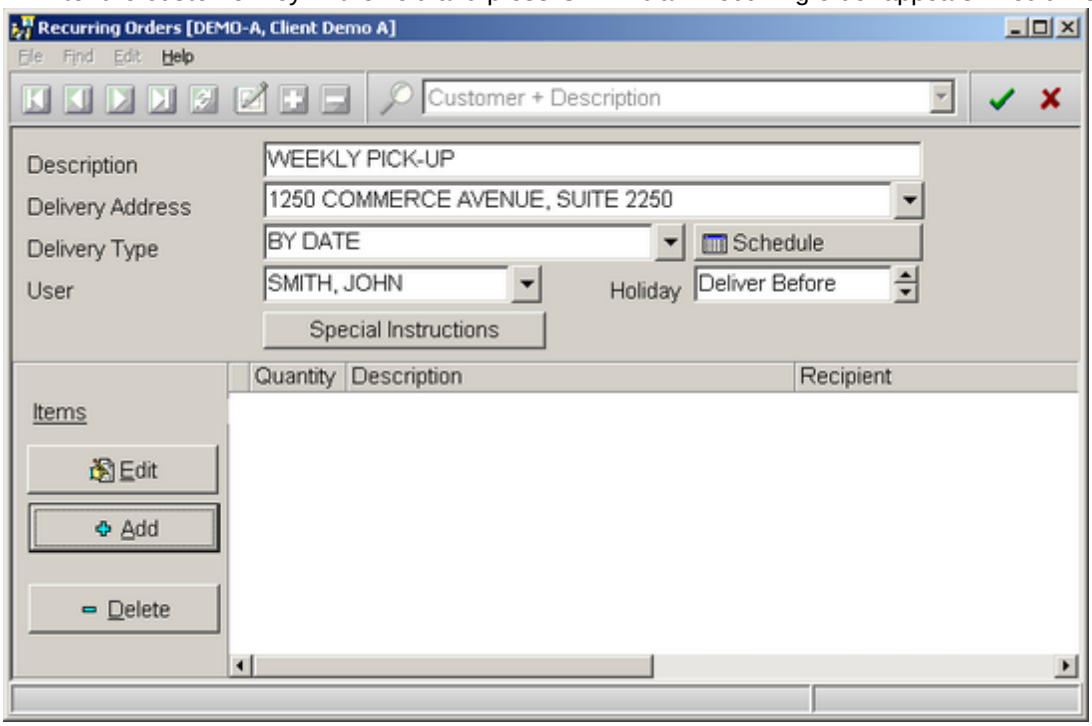
- **Delete** - Button used to delete one or many items in the list.

6.6.15.3 Adding a recurring order

To add a recurring order

1. Click on **Order->Recurring Orders** from the Main window.
2. Click on **Edit->Add**. A dialogue box prompts for a customer.
3. Enter the customer key in the field and press **OK**. A blank recurring order appears in edit mode.



4. Enter a description for the order.
5. Select a delivery address by highlighting it in the drop-down list and clicking **OK**.
6. Select a delivery type by highlighting it in the drop-down list and clicking **OK**. (Note that only "*by date*" delivery types will be available.) When the schedule is set, press **OK**.
7. Select the user in the list (it will appear highlighted) and press **OK**.
8. Specify how to handle deliveries that would fall on **Holidays** and other days that the record center is not opened. (options include *Deliver after*, *Deliver before*, and *Skip*.)

Add items

9. Add items to the order by pressing on the **Add** button.
10. Select the type of item to add (*Returns/Pickups, Line Item, Shredding container / bag rotation,* or *Shredding container emptying*
11. Select the item from the list
12. If prompted, select the department and sub-department for billing purposes
13. Enter the quantity and (optionally for line items) a recipient and press **OK**.

14. Click on the **Special Instructions** button to add instructions to appear on each order.
15. When all the items have been added to the list, press the **Accept** button.
16. Press on the **Schedule** button to set the order's delivery dates. A window appears.

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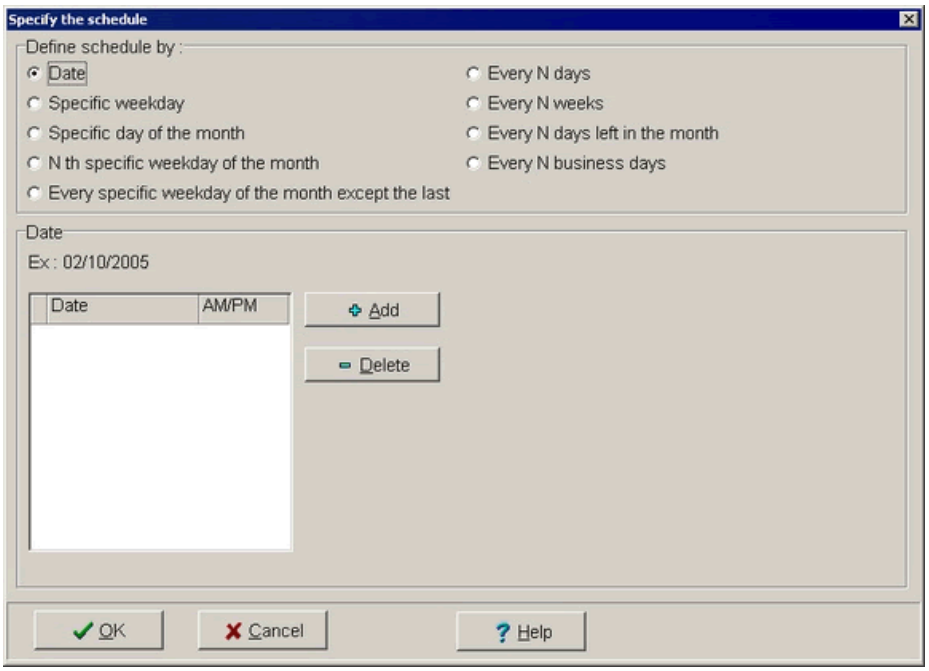
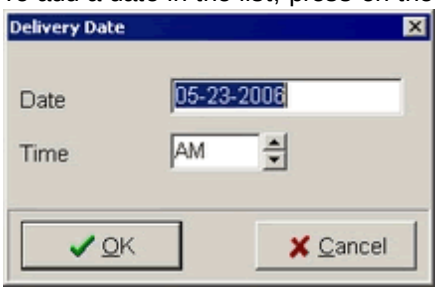


17. Select the way you want to define the schedule in the list of options. For each option a different set up is shown :

- When Date us selected :
  To add a date in the list, press on the **Add** button. A window appears



  - Enter a date and select a time of delivery (AM or PM) and press **OK**.

  - To delete a date, select a date in the list (it will appear highlighted) and press on the **Delete** button.

- When Specific weekday is selected :
  - Select a Day of week (it will appear highlighted).
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When Specific day of the month is selected :
  - Select a Day of the month in the list (1,2,3...).
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When N th specific weekday of the month is selected :
  - Select a N th week (First, second, third ...) in the choice field.

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- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every specific weekday of the month except the last is selected :
  - Select a Day of week (it will appear highlighted).
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When Every N days is selected :
  - Select a number of days (N days) in the choice field.
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When Every N weeks is selected :
  - Select a number of weeks (N weeks) in the choice field.
  - Select a Day of week (it will appear highlighted).
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When Every N days left in the month is selected :
  - Select a number of days left in the month (N Days Left) in the choice field.
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

- When Every N business days is selected :
  - Select a number of business days (N Business Days) in the choice field.
  - Enter a Start Date and an End Date.
  - Select a Time of delivery.
  - Select a specific Month (it will appear highlighted) or select the All option.

6.6.15.4 Viewing recurring orders for a customer

The following provides a report of the recurring orders scheduled for a customer over a given period.

1. Click on **Orders->Recurring Orders** module from the *Main window*.
2. From the menu, select **File->View Report->Recurring orders of customer**.
3. A dialogue window appears. Enter a **customer key** and click **Okay**, or click okay without entering a customer to select from a list.
4. A dialogue window appears. Enter the range of dates over which to report the recurring orders.

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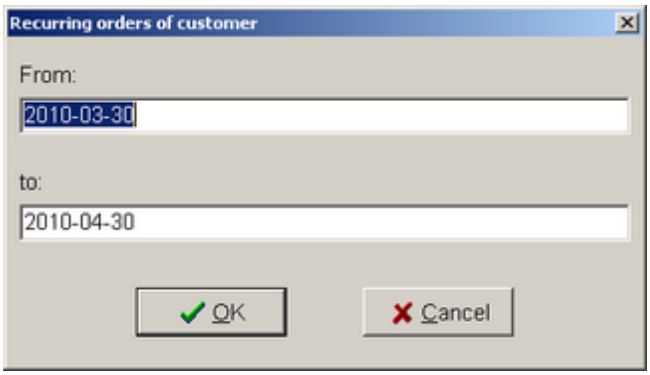
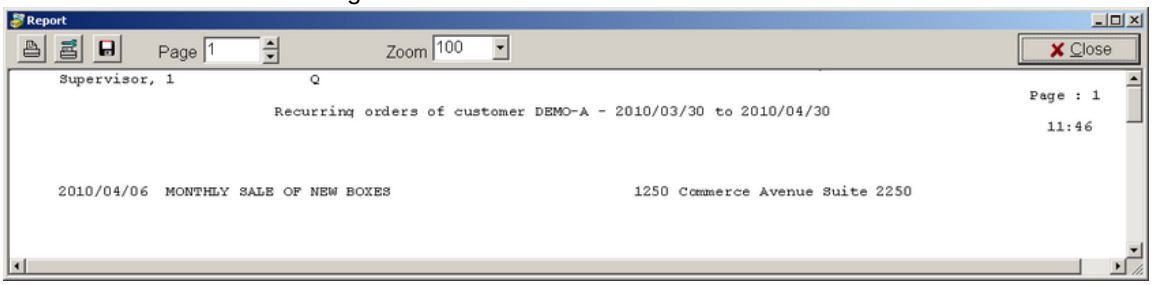


5. A report appears, listing the date, description, and address of the recurring orders for that customer over that date range.



6.6.15.5 Editing or Deleting a recurring order

Editing a recurring order

1. Open the **Order->Recurring Orders** module
2. Navigate to the order to modify.
3. From the menu, select **Edit->Edit**.
4. Edit the information in the entry form.

- To add an item to the order
  - Press the **Add** button.
  - To add a line item, click on the *Line Item* menu item. A list of line items appears. Select the line item to add (it will appear highlighted) and press **OK**.
  - To add a shredding container rotation, click on the *Shredding container / bag rotation* menu item. A list of container types appears. Select the shredding container to rotate (it will appear highlighted) and press **OK**.
  - To empty a shredding container, click on the *Shredding container emptying* menu item. A list of container types appears. Select the shredding container to empty (it will appear highlighted) and press **OK**.

- To edit an existing item from the order:
  - Select the desired item (it will appear highlighted)
  - Press on the **Edit** button.
  - Edit the item's quantity and press **OK**.

- To delete an existing item from the order:
  - Select the desired item (it will appear highlighted)

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- Press on the **Delete** button.

5. When all the changes have been made, press the **Accept** button (green check mark).

For more information on the different fields to edit, consult the Fields (Recurring Orders) 584 and the Adding a recurring order 585 topics.

Deleting a recurring order

1 Click on **Order->Recurring Orders** from the Main window.
2 Search the order to delete.
3 Click on **Edit->Delete**. A confirmation message appears.
4 Press **Yes** to perform the deletion, and **No** or **Cancel** to abort the deletion.
5 The recurring order will automatically be deleted.

6.7 Accounting (Accounting tab)

6.7.1 Outline (Accounting)

The accounting tab and associated modules provide tools for automating the calculation of charges and invoicing of customers.

In EDC, prices are associated to goods and services using price codes. All charges and descriptions on invoices come from price codes. Price code are defined in the general pricing module 632. Any price code can be overridden for specific customers in the customer pricing module 640.

There are three sources of charges on invoices:

1. Storage costs are calculated based on the inventory.
2. Charges may be added directly to the invoice, either manually 603 or as periodic invoice items 646 .
3. All other charges are collected from the deliveries 611 dated during the invoice period.

Various price codes are discussed further in the chapter on *general pricing* 632. For detailed instructions on setting up for billing, see the topics on Configuring EDC for invoicing 64 and setting up the customer to be billed 86.

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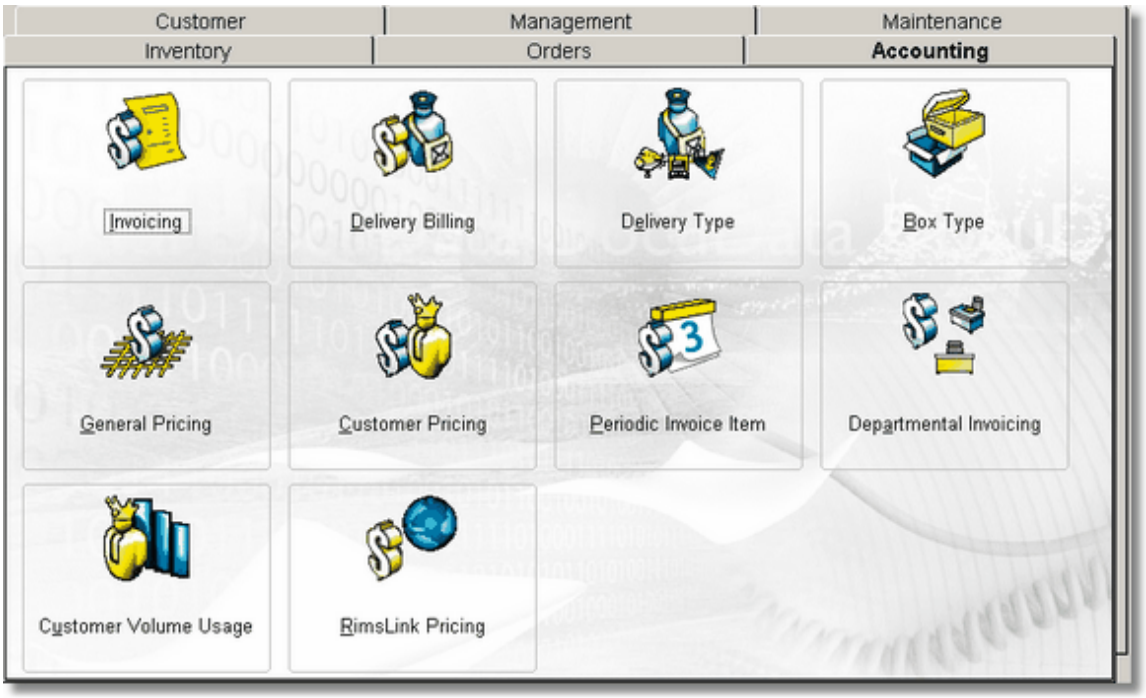

Modules

- Creation of invoices for customers 590, according to their billing parameters
- Consultation and management of charges for each deliveriy 611
- Configuration of delivery types 621
- Configuration of box types 625
- Configuration of general pricing 632 for all services and operations at the record center
- Overriding of general pricing for customers 640 as required
- Configuration of periodic invoice 646 items
- Configuration of of departmental invoicing 649 for a customer
- Consultation of the volume in storage 653 for all customers
- Mapping price code equivalence with partner record centers to serve shared customers 656

6.7.2 Invoicing

6.7.2.1 Overview (Invoicing)

Various settings throughout EDC RC determine how customers are billed for the services they receive. The Invoicing module enables you to efficiently create invoices based on those rules. You may then view, modify, and distribute these invoices, and export the charges to a third-party accounting software to track payment.

Note that EDC requires that all deliveries for the period be returned before it will create an invoice for a given customer, because the calculation of charges is affected by the returning items.

Available reports

- current invoice

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- details of the current invoice
- delivery summary of the current invoice
- (See the *Report* 364 module for additional reports)

Fields 592 **(see the next section)**

Tasks
- Manually creating, editing, printing or deleting an invoice 593
- Creating, editing, printing or deleting selection for auto-invoicing 597
- Creating or printing invoices with auto-selection 600
- Adding notes to an invoice 601
- Printing multiple invoices 602
- Exporting the invoicing to other billing systems 602
- Adding, editing, deleting or viewing items of the current invoice 603
- Viewing or printing some reports 605
- Printing an invoice to a file 606
- Previewing an invoice 606
- Previewing invoice totals 607
- Viewing the web licenses soon to be expired 608
- Viewing or printing items excluded from a selection 609
- Viewing or printing a list of unbilled customers 610 Links 340

Distinctive menu options:

File menu
- Create invoice 593
- Delete invoice 593
- Print invoice 593
- Printing an invoice to a file 606
- Print detailed invoice 605
- Print delivery summary 605
- Printing multiple invoices 602
- Preview invoice 606
- Previewing invoice totals 607
- Commission report 608
- Export (To Quickbooks | To text format) 602

View menu
- Invoice
- Detailed invoice
- Delivery summary
- Notes 601
- Show customer note 601
- Show global note 601
- View web licenses that expire soon 608

Create menu
- Auto selection 597
- Edit selection 597
- Print selection 597
- Erase selection 597
- View | Print excluded from selection 609
- View | Print unbilled customers 610

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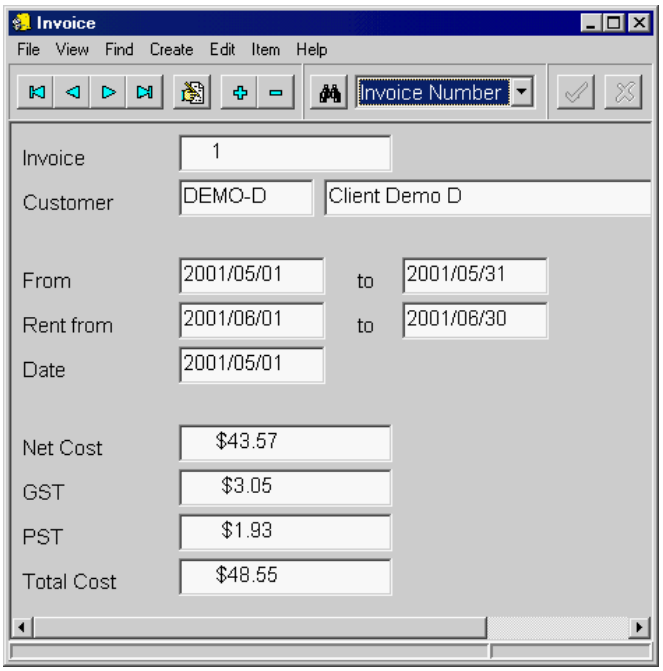
- Create invoices 600
- Print selection invoices 600
- Create service invoices (Customer only | All customers) 610

Edit menu
- Notes 601

Item menu
- Add item 603
- Edit item 603
- Delete item 603
- View items 603

Module window:



6.7.2.2 Fields (Invoicing)

Invoice
Numeric field (cannot be modified).
This number is given to the invoice by the system. For accounting purposes it is essential to keep a certain control over the numbers and to make sure that none are missing. In order to keep a continuous sequence with invoice numbers, if an invoice has to be deleted, it would be better to proceed to the deletion before creating the next invoice.

Customer
This field indicates the client number and the name of the customer for whom the invoice is produced.

From...to
This field indicates the interval of dates for services to be billed. It indicates by default the interval of dates in the month previous to the current month, but it can be modified manually. The current invoice considers all the services given to the customer from the starting date to the last date inclusively.

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Rent from...to
This field indicates the interval of dates for which the storage fees will be charged. The customer is charged for the box types (incidentally the volume) in storage during this period. The intervals of dates for the services and the rent are generally different since the rent fees are usually collected in advance. These fees can be adjusted the month after with a rent credit if the real volume in storage has gone down, because of a destruction or deletion of boxes during the given period. A similar policy can be adopted for boxes added to inventory, which will be charged only for the real time they are in storage or for the whole period (this is determined by the settings of the *Rent Credit* and *Bill full month add/del* fields from the *Customer Information* module.)

Date
This field allows to enter the billing date. The system indicates the current day by default (or when auto creating your invoice run at the beginning of the month it will indicate the last day of the previous month by default), but it can also be modified manually.

Net Cost
This field indicates the cost before taxes.

Tax A
This field indicates the amount of the tax A that applies. The settings in the *System Information*, *Building, Customer Information*, *General Pricing* and *Customer Pricing* modules determine how these taxes are calculated.

Tax B
This field indicates the amount of the tax B that applies. The settings in the *System Information*, *Building, Customer Information*, *General Pricing* and *Customer Pricing* modules determine how these taxes are calculated.

Note : The appellation for these taxes can be modified in the software dictionary from the *Dictionary* module. It can also be changed for the appellation of taxes that apply in any country, state, province, etc.

Total Cost
This field indicates the total amount charged to the customer. It is the net cost plus the applicable taxes.

6.7.2.3 Manually creating, editing, printing or deleting an invoice

Manually creating an invoice

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **File**->**Create Invoice**. A window appears.
3 Enter the customer key and press **OK**. A window appears.

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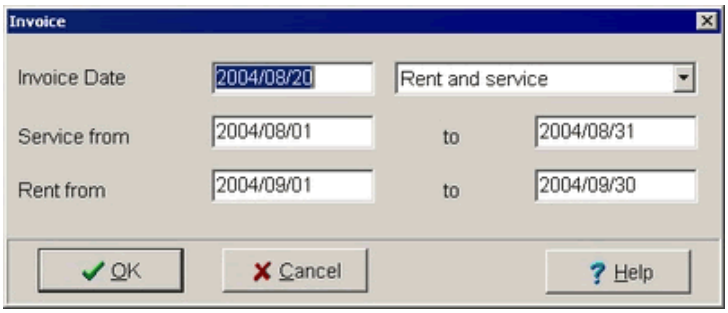
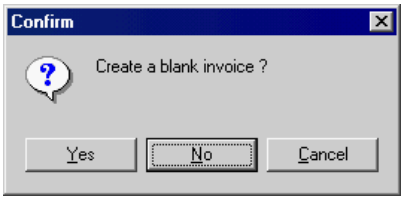


4 Edit the "Invoice Date", the "Service from / to", the "Rent from / to" fields if needed. Select the type of invoice (Rent | Service | Rent and Service). Press **OK**.

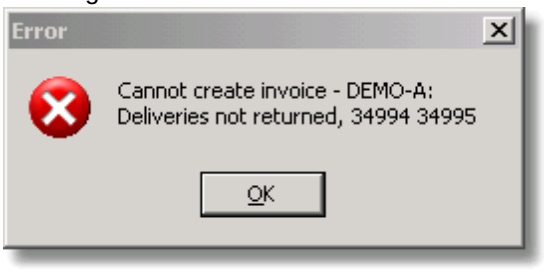
5 Keep this interval of dates or enter another range of dates and press **OK**. This interval of dates will appear in the *From...to* field of the current module. A dialog box appears.



6 There are two different possibilities :

- To create a blank invoice to which the charges will be added manually, click on the **Yes** button. The *Rent from...to*, *Net Cost* and *Total Cost* fields of the current module stay empty.
- To create a regular invoice, click on the **No** button. The system will automatically charge the customer for the fees related to all the delivery items of the given period, for the storage rent of the current month and for the periodic invoice items that apply. All the fields of the current module are filled.

Note : EDC will return an error message if the customer has deliveries for the service period that have not been returned.



7 A window appears for customers that bill by department. (to bill by department, settings must be defined in the *Departmental Invoicing* module and the *Billing* field of the *Customer Information* module must be set to "Department".)

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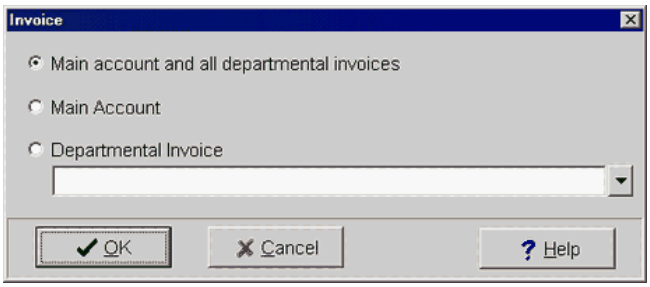


Main account and all departmental invoices : different invoices are created both globally for departments not dissociated in the *Departmental Invoicing* module and for departments dissociated in this same module.
Main Account : a unique invoice is created only for departments that are not dissociated in the *Departmental Invoicing* module.
Departmental Invoice : an invoice is created for the selected department or group of departments (set in the *Departmental Invoicing* module) and includes only the fees related to these.

Note : For *Main Account* invoice, it can be empty if all the departments for that customer have been dissociated in the *Departmental Invoicing* module.

8 Select the desired option and press **OK**. The invoices are automatically created, according to the previous selections.

*Editing the current invoice

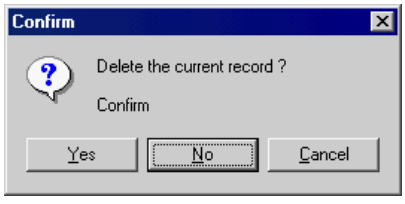
An invoice, blank or not, has been created (operation described above). In both situations the invoice can be edited for modification.

1 Keep the invoice newly created on the screen or search for any other invoice to be modified.
2 Click on **Edit**->**Edit** in the current module.
3 Modify the desired information in the appropriate fields and click on the **Accept** button.

Deleting the current invoice

An invoice was created but for some reason it has to be deleted. This operation can be done as described below but is not advisable. For accounting purposes it is better to keep a continuous sequence with invoice numbers, in order not to have to justify a missing number later.

1 Keep the invoice newly created on the screen or search for any other invoice to be deleted.
2 Click on **File**->**Delete Invoice**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. A window opens.

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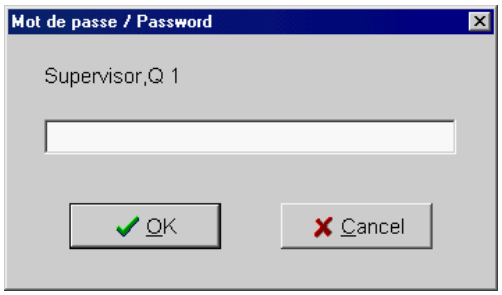

Note : This window is an additional security mechanism, since this type of operation cannot be undone and should be approved only by a limited number of authorized users (supervisor, manager, etc).

4 Enter the password and press **OK**.

Printing the current invoice

After its creation, an invoice can be printed and sent to the customer.

1 Keep the invoice newly created on the screen or search for any other invoice to be printed.
2 Click on **File**->**Print Invoice** in the current module. The invoice is printed soon after (see the example below).

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Docu-Dépôt Inc.
1, Van Horne Ave.
Montréal, PQ, H2T 2J1
Telephone: (514) 271-3223
Fax: (514) 271-4012

INVOICE

INVOICE NUMBER 1

DATE 05/01/2001
MM/DD/YYYY

Client Demo D
3, Montcalm
Suite 25b
Montreal, Qc
H1H

Account DEMO-D

ATTENTION:

Net 30 days

QUANTITY	DESCRIPTION	PRICE	AMOUNT
	Rent from 06/01/2001 to 06/30/2001		
135.60 Cubic Feet	STORAGE	$0.1775	$24.07
	Open shelf from 05/01/2001 to 05/31/2001		
5.00 Units	OPEN SHELF REFILING	$1.5000	$7.50
6.00 Units	OPEN SHELF FILE RETRIEVAL	$2.0000	$12.00
	GST No.: R129298741 QST No.: 1002911945	SUB-TOTAL GST PST	$43.57 $3.05 $1.93
		TOTAL	**$48.55**

6.7.2.4 Creating, editing, printing or deleting selection list for auto-invoicing

Auto-invoices include all the charges related to delivery items for a specific period. They also include storage fees for a given time, though only for customers on the selection list. These customers are billed consequently and according to the billing settings of the *System Information* 195, *Customer Information* 223, *Customer Pricing* 640 and *General Pricing* 632 modules.

Before proceeding to the creation of auto-invoices, it is necessary to establish or update the selection list of customers, as well as the interval of dates for which the customers will be billed.

Creating the selection list

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**Auto Selection**. A list of buildings appears.

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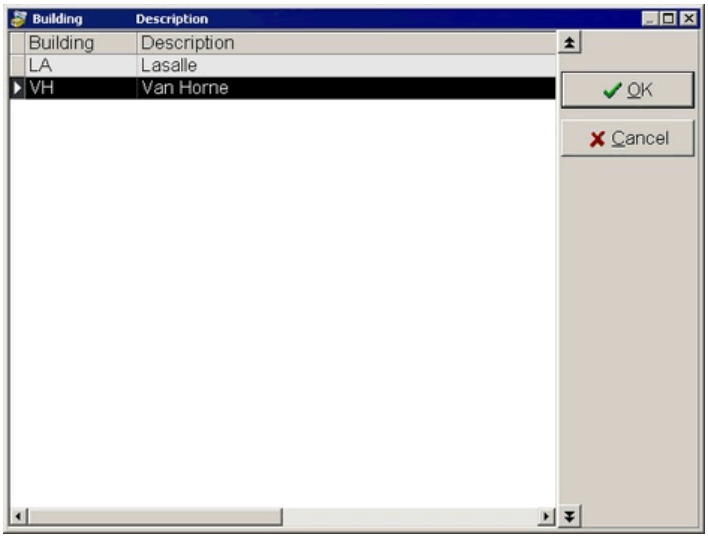
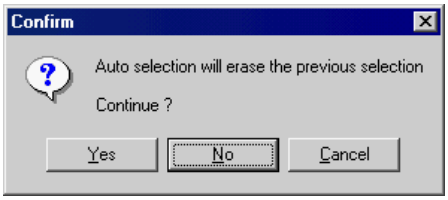
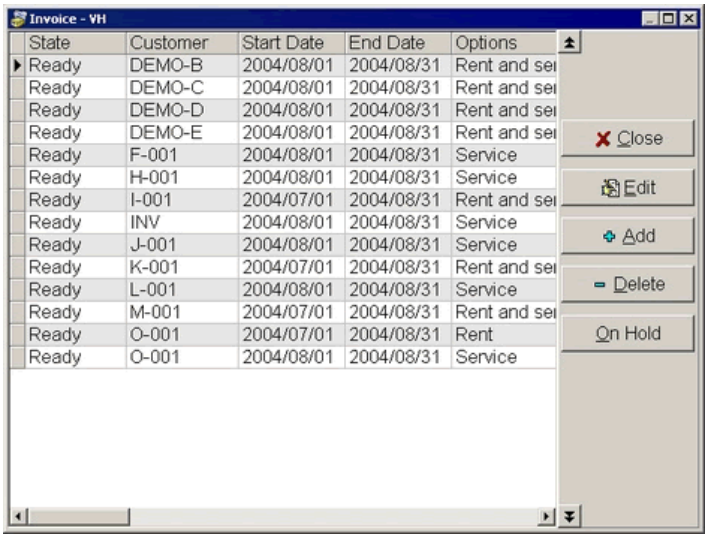


3 Select the building from which you want to bill and press **OK**.
4 A dialog box appears.



5 Click on the **Yes** button to perform the operation. A window appears.
6 Enter the date that you are running the invoicing (ex: September 30th would be run in the first days of October. The date that you enter here would be a date in October). A list appears.


Invoice - VH
State
Customer
Start Date
End Date
Options
Ready DEMO-B 2004/08/01 2004/08/31 Rent and se
Ready DEMO-C 2004/08/01 2004/08/31 Rent and se
Ready DEMO-D 2004/08/01 2004/08/31 Rent and se
Ready DEMO-E 2004/08/01 2004/08/31 Rent and se
Ready F-001 2004/08/01 2004/08/31 Service
Ready H-001 2004/08/01 2004/08/31 Service
Ready I-001 2004/07/01 2004/08/31 Rent and se
Ready INV 2004/08/01 2004/08/31 Service
Ready J-001 2004/08/01 2004/08/31 Service
Ready K-001 2004/07/01 2004/08/31 Rent and se
Ready L-001 2004/08/01 2004/08/31 Service
Ready M-001 2004/07/01 2004/08/31 Rent and se
Ready O-001 2004/07/01 2004/08/31 Rent
Ready O-001 2004/08/01 2004/08/31 Service
Close
Edit
Add
Delete
On Hold

Note : This window indicates the customers for whom the *Active* and *Auto Invoice* fields are set to "Yes" in the *Customer Information* module. For the customers that bill the Rent and the Service separately, the customer will appear twice in the list, once for the service charges and once for the rent charges (that is of course if the two are billed at the same time for that

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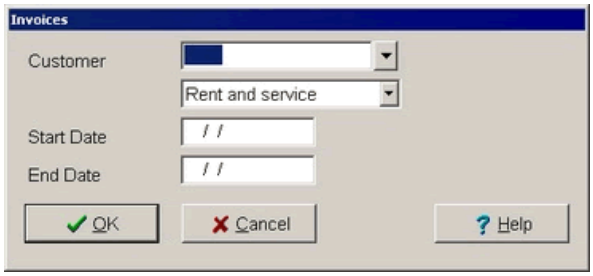
specific month). Note that new box adjustments will be charged in the Service invoice when the rent is set to *Forward* (even if it is a rent charge). The billing period written by default is starting and finishing the first and the last day of the month previous to the current month. The selection only indicates which customers are set for the auto-invoicing and can be modified here. When proceeding to the creation of the next auto-invoices, the selection will ignore these changes. That is why a dialog box appears at the beginning of each auto-invoicing operation.

7 To modify the selection, follow the procedures described below:

- To add a customer, click on the **Add** button. A new window appears.



Select the desired customer and enter a start date and end date for the billing period. Select the type of invoice (Rent and Service | Service | Rent) and press **OK**. The customer will appear in the window opened in **6**.

- To delete a customer, select it (it will appear highlighted) and click on the **Delete** button. The customer will not appear anymore in the window opened in **6**.

- To edit a customer, select it and click on the **Edit** button. The window that appeared for the addition of customers appears, with the only difference that the name of the customer is the one you selected. Edit the content of the window and press **OK**.

- To put a customer on hold, select it and click on the **On Hold** button. The status beside the customer key will change from "Ready" to "On Hold".

Note : A default billing period which cannot usually be modified is granted to the customers originally included on the list. But for customers manually added on the list, a billing period can be chosen, as described above. It is possible to bypass the system by deleting a customer from the list and by manually adding him to the list.

8 Click on the **Close** button to save changes. When the auto-invoices will be created later, it is the selection list that is set here that will be considered.

Editing the selection list

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**-> **Edit selection list**
3 A window appears (see step **6** from previous topic)
4 To edit the selection list follow steps **7** and **8** from the previous topic.

Print the selection list

The printing of the selection list can be useful, especially to verify the list.

1 Click on **Accounting**->**Invoicing** from the *Main window*.

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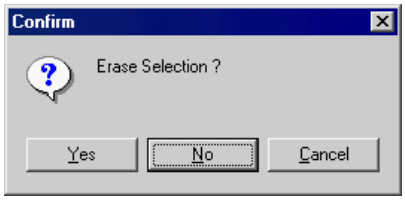
2 Click on **Create**->**Print Selection**. The selection list will be printed automatically on the default printer.

Note : For the customers that have the "Invoice format 230" option set to *Electronic* in the *Customer Information* module, the invoice will be sent by email automatically.

Deleting the selection list

For many reasons the record center can decide to create a new selection list and must be able to delete the old one.

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**Erase Selection**. A dialog box appears.



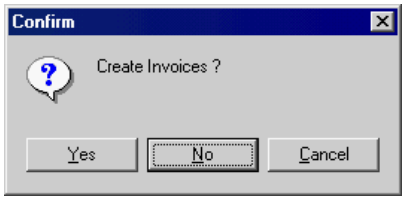
3 Press *Yes* to confirm the deletion. The selection list will be automatically reset. It will not be possible anymore to print the selection and to create the auto-invoices. An error message will be displayed when trying to perform these operations and will indicate that the selection list is empty.

6.7.2.5 Creating or printing invoices with auto-selection

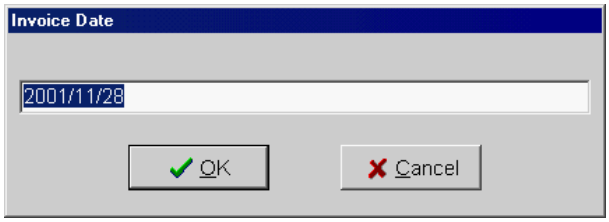
Auto-invoices bill the different service charges (related to deliveries) and/or the rent services (related to storage) for a given period of time. In fact, they are only created for customers included in the selection list, which is why it is very important to determine if the selection list is correct before creating the auto-invoices. (This operation is described in the previous section 597.)

When the selection is ready, the record center can produce the auto-invoices.

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**Create Invoices**. A dialog box appears.



3 Click on the **Yes** button to confirm the operation. A window opens on the screen.



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Note : This window displays the last day of the month preceding the current month by default. When calculating the storage fees, the system will not consider the date manually entered here. Only the current month will be considered. For example, if auto-invoices are created on August 1st and the date is changed for July 31th, the storage fees are charged for the time period starting on August 1st and ending on August 31th.

4 Keep the default date or enter any other date that must appear on the invoice and press **OK**.
5 The system automatically proceeds to the creation of the invoices. The current volume in storage for each customer on the selection list is calculated as well as the charges related to delivery items for the selected period.

Note : The delivery charges can be manually modified before creating auto-invoices in the *Delivery Billing* 611 module.

***6** The created invoices appear in the current module. In order to be sent to customers, these invoices can be printed by clicking on **Create**->**Print Selection Invoices**.

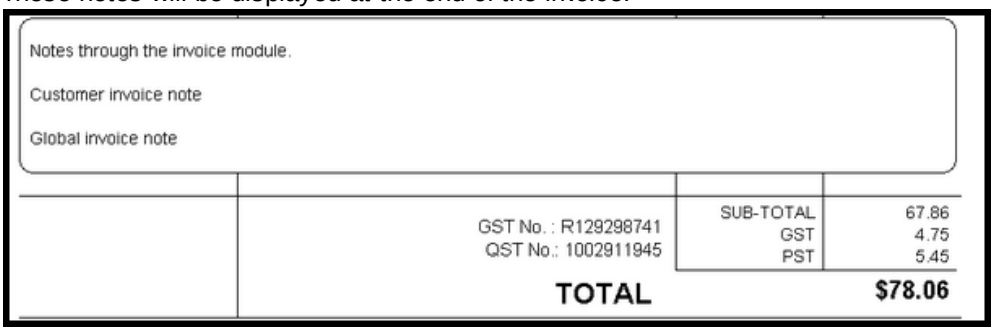
6.7.2.6 Adding notes to an invoice

It is possible to add three types of notes to an invoice. The global invoice note 211 is available to appear on all invoices, whereas the customer invoice note 269 is available for invoices for a specific customer. The third option is to add a note to a specific invoice.

To add a note to an invoice:

1. Open the **Accounting->Invoicing** module, and navigate to the correct invoice.
2. From the menu, select **Edit->Note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.



To toggle customer or global invoice notes on or off for an invoice:

1. Open the **Accounting->Invoicing** module, and navigate to the correct invoice.
2. On the menu, select or deselect **View->Show customer note | Show global note** as desired.

If the check-mark beside the option is cleared, the corresponding note will not appear on the specified invoice.

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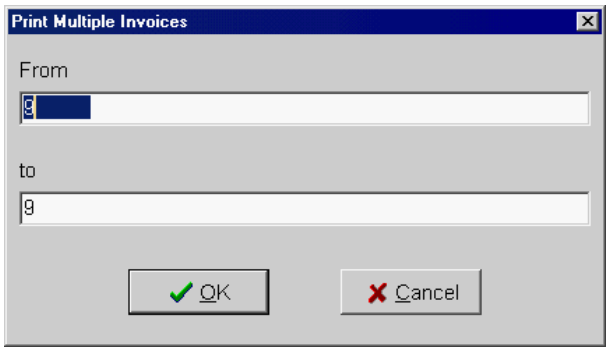
6.7.2.7 Printing multiple invoices

This operation allows to print many invoices simultaneously (the invoices have to be created first.)

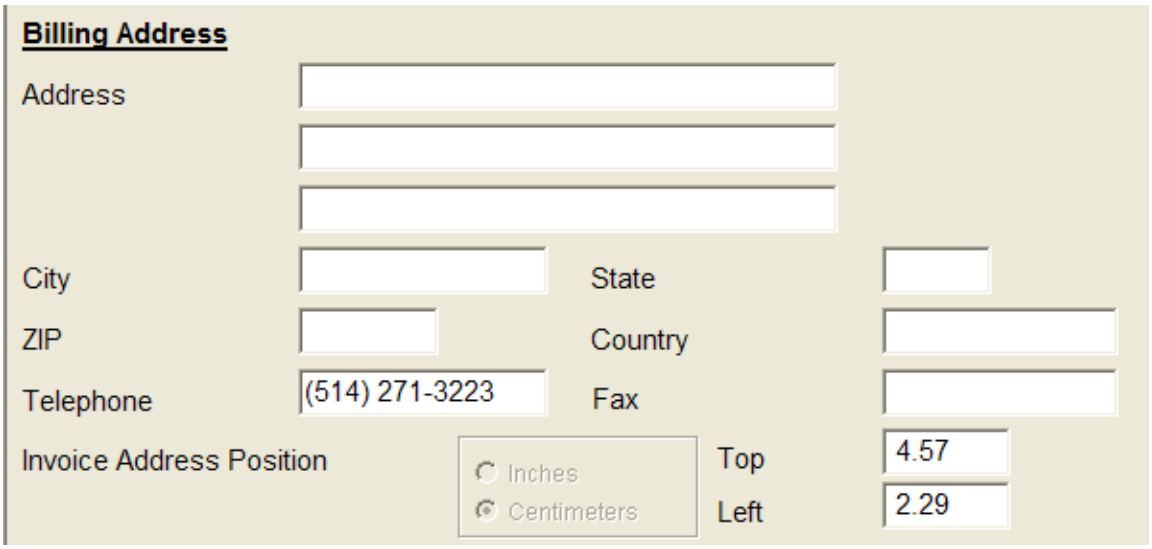
1. Click on **Accounting**->**Invoicing** from the *Main window*.
2. Click on **File**->**Print Multiple Invoices**. A window appears.



3. Enter the interval of the desired invoice numbers (these numbers appears at the *Invoice* field of the current module) and press **OK**. The invoices are automatically printed on the default printer.

6.7.2.8 Positioning the billing address on the invoice

If the default position of the billing address on the invoice is not suited to your envelopes for example, you can change it's positioning on the invoice. This setting is located in the "System Information" module under the billing section:



6.7.2.9 Exporting the invoicing to other billing systems

Invoice information can be exported from EDC in two different formats for import to commercial accounting systems. The QuickBooks format can be imported directly to QuickBooks. A generic text format is also available.

Prior to exporting invoices it is important to configure your system for billing, to ensure that the

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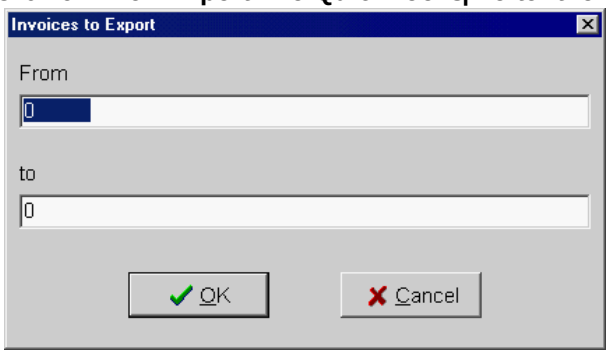
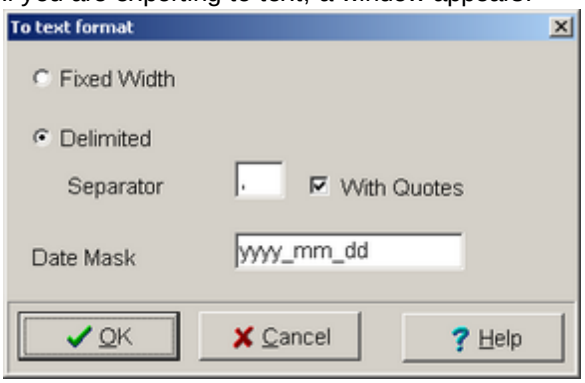
exported data will be recognized by your accounting software.

1. Click on **Accounting->Invoicing** from the Main window.
2. Click on **File->Export->To QuickBooks| To text format**. A window appears.



3. Enter the desired interval of invoices and press **OK**.
4. A window appears, prompting for a file name and directory to export the data to. By default, invoice export files are named "EDC_INV_YYYY_MM_DD", where YYYY_MM_DD is the date on which the invoices were exported. Change the name if desired, then click **Save**.

- If you are exporting for import to Quickbooks, the file will be saved
- If you are exporting to text, a window appears:



-

5.
6. Save the data in the chosen file by following the indications that are displayed on the screen (different for each workstation). The user will have to import the saved file into his new accounting system in order to recover the data.
7.

Related topics:
Format of text export 603
Quickbooks export setup

6.7.2.10 Format of text export

6.7.2.11 Adding, editing, deleting or viewing items of the current invoice

An invoice was just created, manually or by auto-selection, and its items need to be corrected before sending the invoice to the customer. To do so, keep the invoice on the screen or search for another invoice, and perform one of the operations described below.

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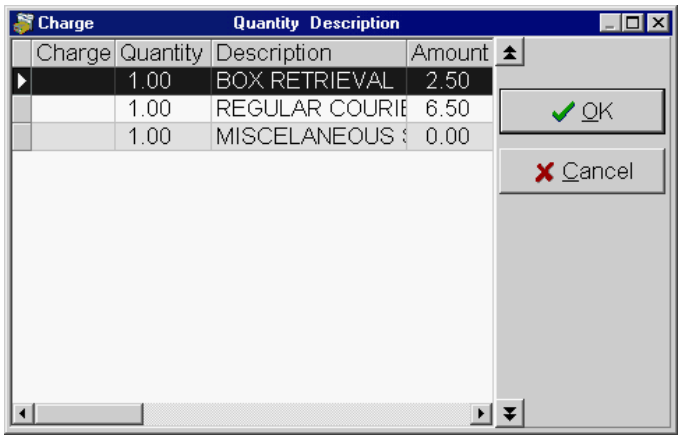
Viewing the items of the current invoice

1 Click on **Item**->**View Items** in the *Invoicing* module. A window appears.

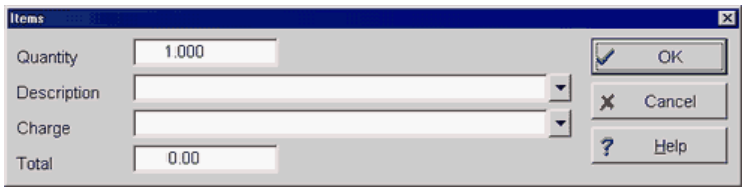


Note : This window displays all the items of the current invoice, including a description, quantity, amount and charge code or department to bill (when customers are billed by charge code or department).

2 Press **OK** when finished.

Adding items to the current invoice

1 Click on **Item**->**Add Item** in the *Invoicing* module. A window appears.



Note : *Quantity* allows to specify how many items must be added.
Description allows to select an item in the predefined list. This description can be modified according to customer needs.
Charge allows to select the department or charge code to which the item will be billed.
Total automatically indicates the predefined fees related to an item, if such is the case. If not, they can be entered manually.

2 Enter the desired information in the appropriate fields and press **OK**. The item will be added to the invoice and its total cost will be adjusted consequently.

Editing the items of the current invoice

1 Click on **Item**->**Edit Item** in the *Invoicing* module. A window appears.

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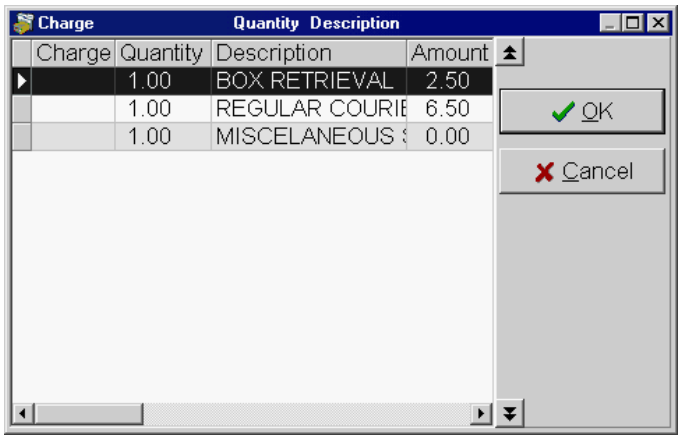
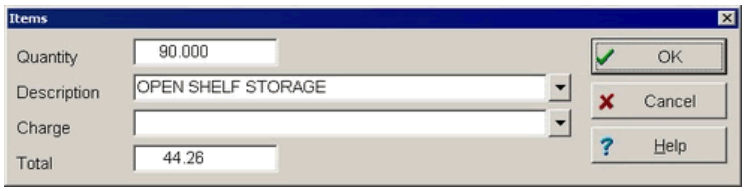


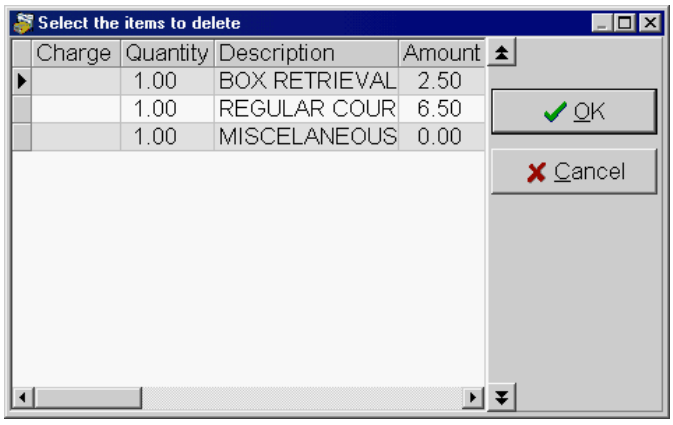
2 This window contains all the invoice items. Select the desired item (it will appear highlighted) and press **OK**. A window opens.



3 Edit the desired information in the appropriate fields and press **OK**. If it applies, the total cost of the invoice will be corrected consequently.

Deleting items from the current invoice

1 Click on **Item**->**Delete Items**. A window appears.



2 Select an item (it will appear highlighted) and press **OK**. The item is automatically deleted from the invoice and the invoice costs are corrected consequently.

6.7.2.12 Viewing or printing reports

The *Invoicing* module allows to view and print the current invoice, its details and delivery summary.

The invoice will be an exact copy of the final one that will be printed for the customer.

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The detailed invoice will show all the fees, classified by department or by charge code (depending on what basis the customer is billed.)
The delivery summary will give the description, the quantity and the cost of each delivery item.

Viewing reports

1 Keep the invoice newly created or any other invoice on the screen.
2 Click on **View**->**Invoice**|**Detailed Invoice**|**Delivery Summary**.
3 The report is displayed soon after, according to the chosen menu item.

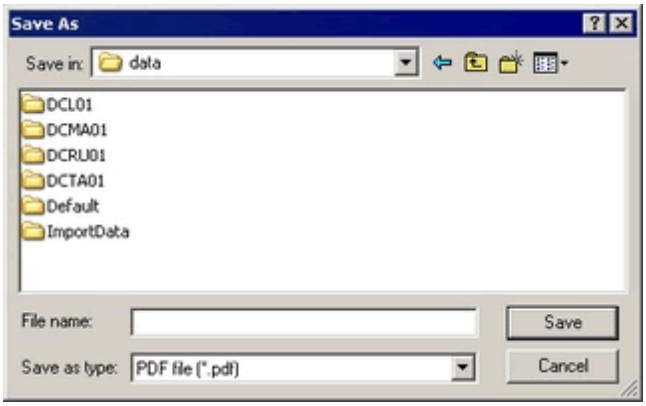
Note : One can print the report while viewing it by clicking on the **Print** button. After viewing the report, one can save the report to a file (see Printing an invoice to a file 606).

Printing reports

1 Keep the invoice newly created or any other invoice on the screen.
2 Click on **File**->**Print Invoice**|**Print Detailed Invoice**|**Print Delivery Summary**.
3 The report is automatically printed, according to the chosen menu item.

6.7.2.13 Printing an invoice to a file

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **File**->**Print Invoice to File**. A window appears (the window will be different for every computer).



3 Select a file or folder.
4 Select a type (ex: PDF file)
5 Create a filename
6 Press Save

6.7.2.14 Previewing an invoice

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **File**->**Preview Invoice**. A window appears.

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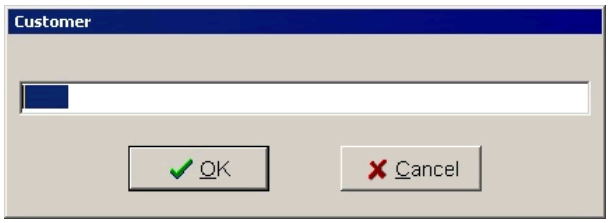
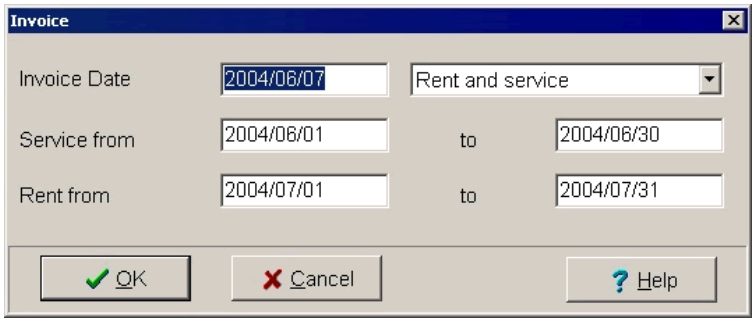


3 Select a customer (to have the list of customers press **OK** -- the customer selected will appear highlighted) and press **OK**. A window appears.



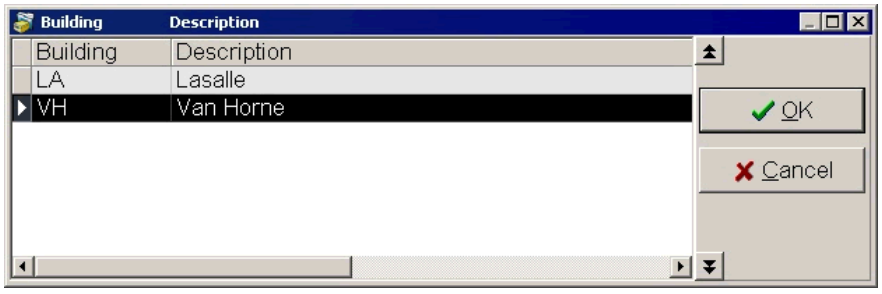
4 Select an invoice date.
5 Select the type of invoice in the drop-down field at the right (Rent and Service | Rent | Service).
6 Select a range of dates for the service and the rent.
7 Press the **OK** button. The software will automatically create a preview of the invoice. To print the invoice press **Print** ; to close the preview press **Close**.

Note: The invoice preview should not be sent to a customer.

6.7.2.15 Previewing invoice totals

Previewing invoice totals is especially useful for record centers, since it gives a good idea of the month's benefits.

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **File**->**Preview Invoice Totals**. A window appears.



3 Select a building in the list (it will appear highlighted) and press **OK**.
4 The preview will automatically be created.
5 To print the preview press on the print icon at the top left of the window.

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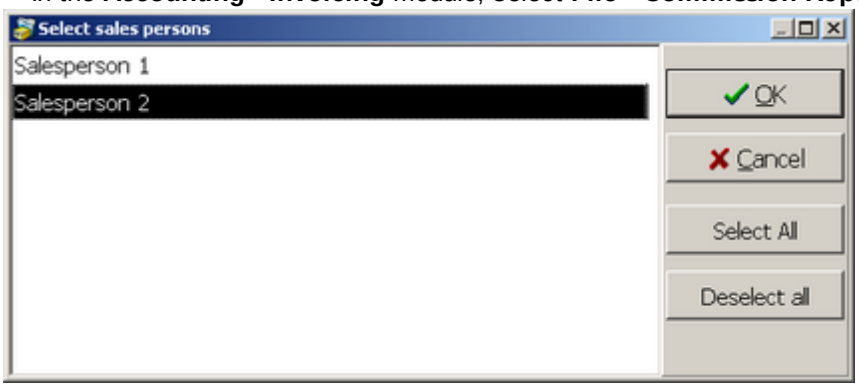
6.7.2.16 Viewing commission reports

View the commission report

1. In the **Accounting->Invoicing** module, select **File->Commission Report**. A window appears.



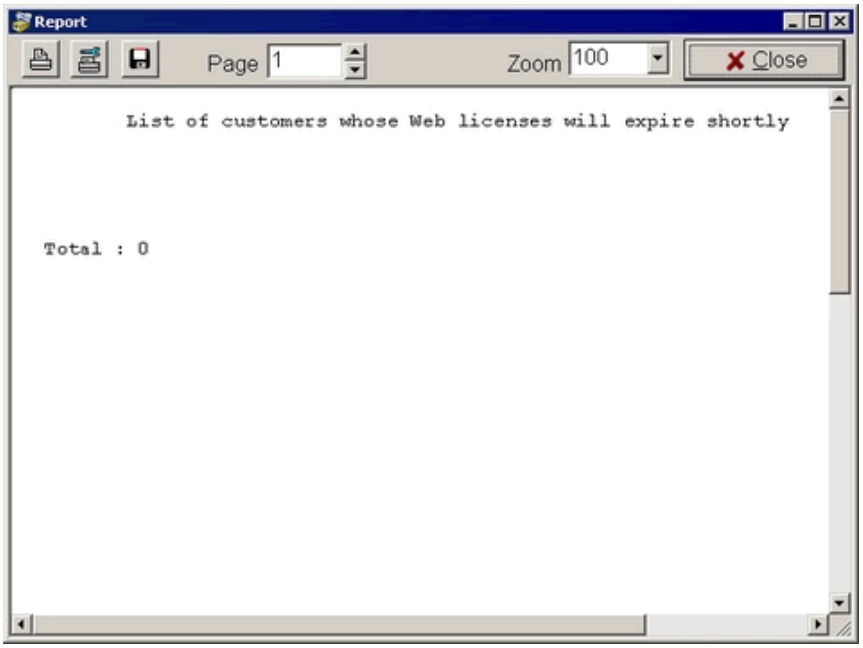
2. Select the salespeople for whom you wish to view commissions, then press **Enter** or click **OK**.
3. Enter the range of invoice dates over which you wish to view commissions, then press **Enter** or click **OK**.
4. The system will produce a report listing the sales people, commissioned sales totals and commissions per account, and total commissioned sales and commissions per salesperson.

Related topics

Enabling and viewing Sales Commissions 273

6.7.2.17 Viewing web licenses soon to be expired

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **File**->**View web licenses that expire soon**. A window appears.



3 To print the preview press on the print icon at the top left corner of the window.

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6.7.2.18 Viewing or printing customers excluded from a selection

Viewing items excluded from a selection

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**View excluded from Selection**.
3 The preview is automatically created. To print this preview press on the print icon at the top left corner of the window.

Printing items excluded from a selection

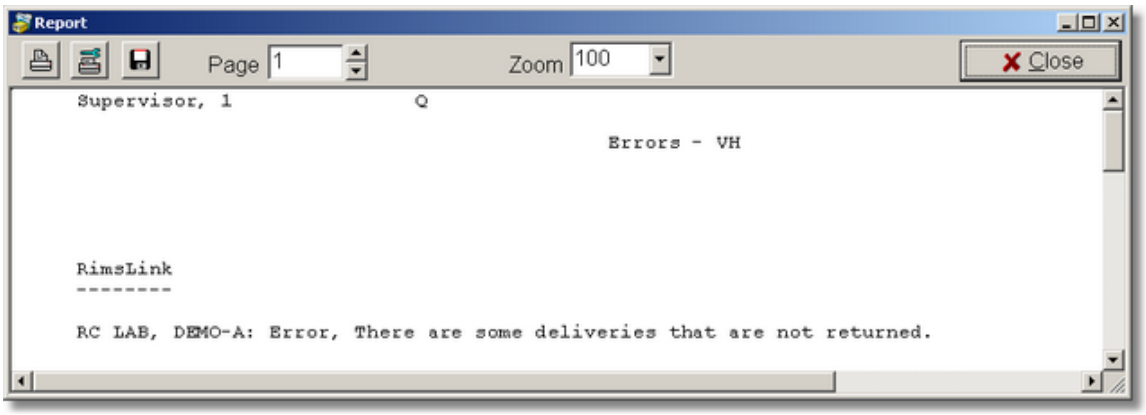
1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**Print excluded from Selection**.
3 The preview is automatically printed.

6.7.2.19 Invoicing with RimsLink

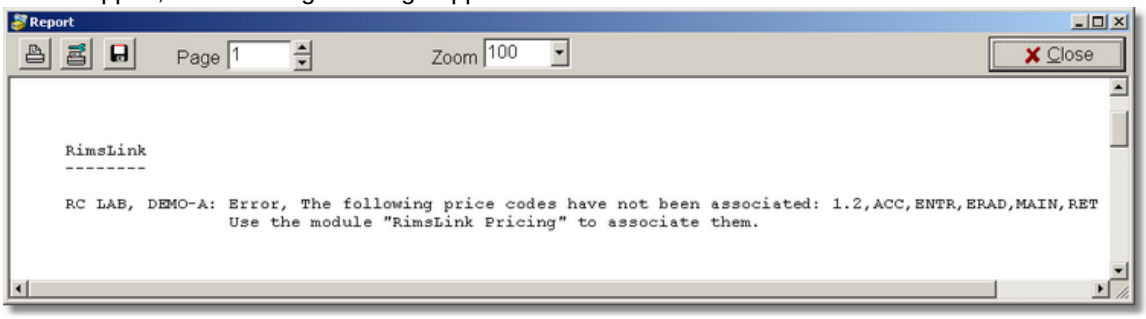
When EDC creates an invoice for a shared customer at the *Billing* record center, it pulls information from the *service* record center's database.

As when invoicing any customer, it is important that all deliveries for the billing period be returned, and all boxes be properly sized.

If a delivery is not returned at the service site, a message such as the following appears during invoice creation.



If a shared customer incurs a charge at the *service* record center with a price code that has not yet been mapped, the following message appears.


Report
Page 1
Zoom 100
Close
RimsLink
RC LAB, DEMO-A: Error, The following price codes have not been associated: 1.2,ACC,ENTR,ERAD,MAIN,RET
Use the module "RimsLink Pricing" to associate them.

When a price code is used for the first time, a message appears if the price code is not overridden in customer pricing.

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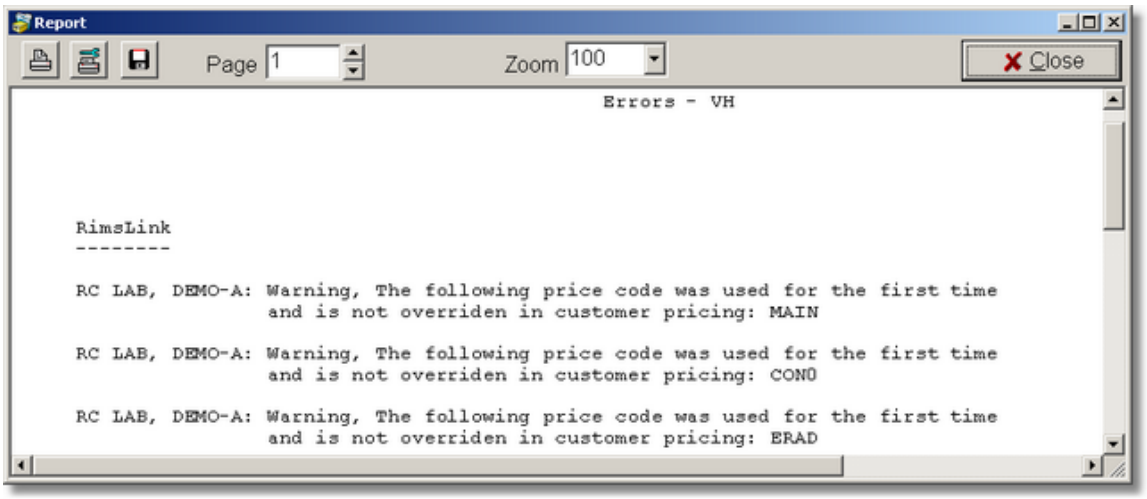
Report
Page 1
Zoom 100
Close
Errors - VH
RimsLink
RC LAB, DEMO-A: Warning, The following price code was used for the first time and is not overriden in customer pricing: MAIN
RC LAB, DEMO-A: Warning, The following price code was used for the first time and is not overriden in customer pricing: CONO
RC LAB, DEMO-A: Warning, The following price code was used for the first time and is not overriden in customer pricing: ERAD

6.7.2.20 Viewing or printing a list of unbilled customers

This is useful to know if any customers have been forgotten.

1 Click on **Accounting**->**Invoicing** from the *Main window*.
2 Click on **Create**->**View|Print unbilled customers**.
3 The preview is automatically created. To print this preview press on the print icon at the top left corner of the window.

6.7.2.21 Creating service only invoices

Service only invoices are useful for clients that only purchase line items (like boxes) and that do not have any items in the inventory. If the customer is set as service only, the previous deliveries will not be charged if they were not invoiced. Note that the delivery must be returned before the invoice can be created.

In order to create service only invoices, a few settings must be defined in the *Customer Information* module for the specific clients.

1 Edit or define the different fields of the *Customer Information* module (in the Billing section) for the wanted customer(s).

- The customer must have the option "Service only 230" set to *Yes*.
- The "Courier billing" must be set to *Delivery*.
- The "Hourly rate" must be defined when needed.
- The "Invoice format" must be set (Paper and/or Electronic)
- The "Taxable" field must be set to *Yes* if the client must be taxed.
- The "Billing building" must be defined.
- A "Renewal date" must be defined (it usually corresponds to the end date of the customer's contract.)
- The "Billing" field can be defined according to customer needs.
- The fields "Bill to" and "Email" need to be defined (the email is only necessary if the "Invoice format" is electronic).
- The rest of the fields from the section can stay as default.

Note: The customers that are set to service only do not appear in the auto selection list even if the

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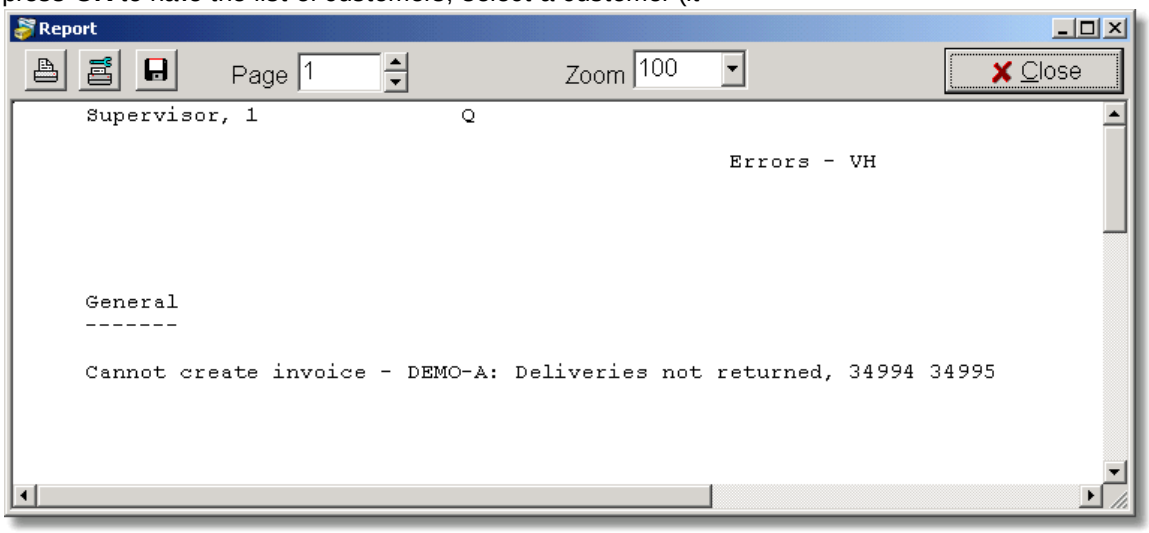
"Auto Invoice" option is set to *Yes*. When periodic invoice items are created for service only clients, the system will not add them automatically to the invoices.

2 Click on **Accounting**->**Invoicing** from the *Main window*.
3 Click on **Create**->**Create Service Invoices** -> **Customer only | All customers**
4 If you have previously selected **Customer only**, a window appears. Enter the customer key or press **OK** to have the list of customers, select a customer (it



will appear highlighted) and press **OK**.
5 A window appears. Edit the invoice date or leave it as it is, and press **OK**.
6 The system will calculate all the deliveries containing services for the desired customer(s).
7 One or many invoices are created.

6.7.3 Delivery Billing

6.7.3.1 Overview (Delivery Billing)

The delivery billing module permits you to review and modify charges on deliveries, so that any corrections or changes will be accurately captured upon invoice creation. It is worth noting that deliveries are automatically created for certain operations such as changing the cardboard of a box if it is billable, and that operations performed without a delivery are not automatically billed.

Available reports
- daily, weekly, monthly or annual statistics of items (for one or for all customers) 618
- daily, weekly, monthly or annual delivery statistics (for one or for all customers) 618
- integrity of quantities for delivered items 618

Fields
- None

Tasks
- Choosing a delivery to activate the module 613
- Viewing some components of the current delivery 613

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- Viewing the summary of delivery charges 615
- Viewing the summary of delivery items, either by department or charge code 615
- Deleting charges associated to returned or delivered items 615
- Editing quantities of returned or delivered items 615
- Adding predefined notes to a delivery and editing their content 616
- Canceling or restoring all delivery charges 616
- Adding extra services to a delivery 617
- Removing items from a delivery 617
- Viewing or printing some statistics 618

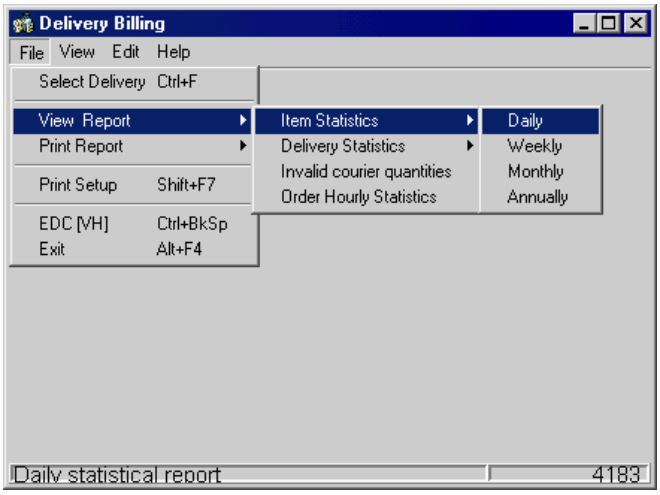
Distinctive menu options:

File menu
- Select delivery 613

View menu
- Orders 613
- Order items 613
- Return items 613
- Courier quantities 613
- Delivery notes 613
- Charge summary 615
- Departmental summary 615
- Charge back summary 615

Edit menu
- Order items 615
- Return items 615
- Courier quantities 615
- Delivery notes 616
- Cancel all charges 616
- Restore all charges 616
- Add line items 617
- Remove item 617
- Change delivery type 620

Module window:



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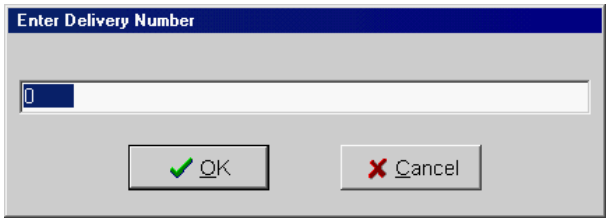
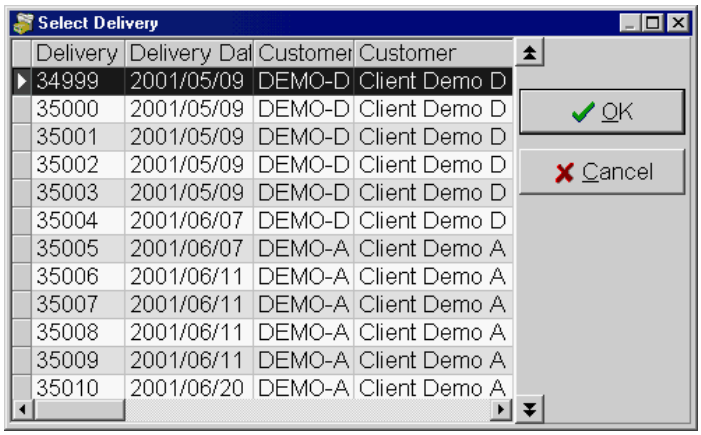
6.7.3.2 Choosing a delivery to activate the module

When opening the *Delivery Billing* module, only the *File* and *Help* menus are available. To activate the other menus it is necessary to choose a delivery to which subsequent operations are performed in the current module.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Click on **File**->**Select Delivery**. A window appears.



3 Enter the desired delivery number and press **OK**. If the entered number does not exist, a new window opens.


Select Delivery
Delivery
Delivery Dat
Customer
Customer
34999 2001/05/09 DEMO-D Client Demo D
35000 2001/05/09 DEMO-D Client Demo D
35001 2001/05/09 DEMO-D Client Demo D
35002 2001/05/09 DEMO-D Client Demo D
35003 2001/05/09 DEMO-D Client Demo D
35004 2001/06/07 DEMO-D Client Demo D
35005 2001/06/07 DEMO-A Client Demo A
35006 2001/06/11 DEMO-A Client Demo A
35007 2001/06/11 DEMO-A Client Demo A
35008 2001/06/11 DEMO-A Client Demo A
35009 2001/06/11 DEMO-A Client Demo A
35010 2001/06/20 DEMO-A Client Demo A
OK
Cancel

Note : This window contains all the deliveries registered in the system since the beginning of the activities for the record center.

4 Select the desired delivery (it will appear highlighted) and press **OK**.

Note : The number of the selected delivery is displayed on the right bottom corner of the module.

5 The **View** and **Edit** menus are now available. All the connected operations can be performed for the selected delivery. During process, it is possible to choose another delivery by repeating steps **2** to **4**.

Note : An error message is displayed when choosing a delivery that is not returned yet, but the menus are activated anyways.

6.7.3.3 Viewing some components of the current delivery

A delivery was chosen (see the previous section 613). It is now possible to view the components of the current delivery.

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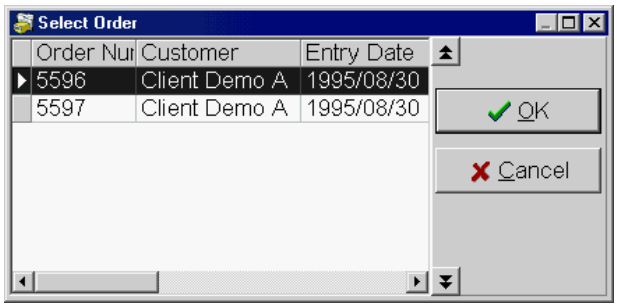
Viewing orders

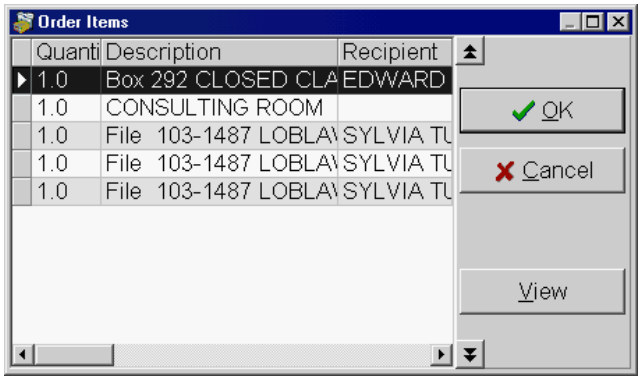
1 Click on **View->Orders** in the current module. A window appears.



2 This window shows all the orders grouped on the delivery. Press **OK** when finished.

Viewing delivered items

1 Click on **View->Order Items** in the current module. A window appears.



2 This window displays all the items delivered to the customer. Press **OK** when finished.

Viewing returned items

1 Click on **View->Return Items** in the current module. A window appears and displays a list of all the items returned on the delivery.
2 This window shows all the items returned on the delivery. Press **OK** when finished.

Viewing courier quantities

1 Click on **View->Courier Quantities** in the current module. A report appears and indicates the quantity of courier shipped or returned.
2 Click on the **Close** button of the report's window when finished.

Viewing delivery notes

These notes are the ones added on the delivery in the current module (see "Adding predefined notes to a delivery and editing their content 616").

1 Click on **View->Delivery Notes** in the current module. The report is automatically displayed.
2 Click on the **Close** button to end the viewing.

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6.7.3.4 Viewing the summary of delivery charges

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **View**->**Charge Summary**. A report's window appears and gives a list of the item types on the invoice, including the quantity, the unit cost and the total amount that is billed.

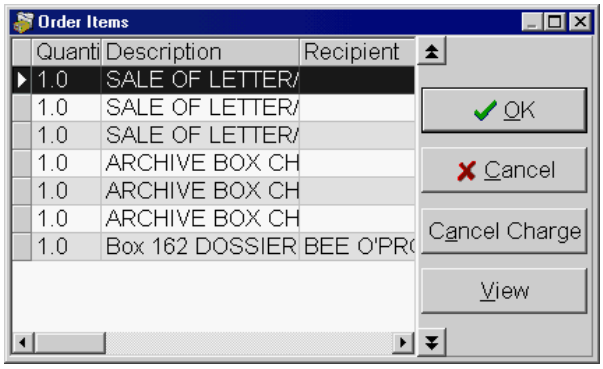
6.7.3.5 Viewing the summary of delivery items, either by department or charge code

This operation is not effective all the time. The menu items *Charge Back Summary* and *Departmental Summary* are only active for customers billed by charge back or by department (settings of the *Customer Information* module). For customers billed on a regular basis, none of these menu items are active.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **View**->**Departmental Summary**|**Charge Back Summary**. The report's window appears and shows a summary of delivery items, including the quantity, the unit cost and the total amount that is billed, either for each department or charge code.

6.7.3.6 Deleting charges associated to returned or delivered items

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **Edit**->**Order Items**|**Return Items**. A window appears.



Note : A delivery does not always contain return or delivery items. That is why a message can appear, instead of this window, and can indicate that there is no item in the selection.

4 Select an item (it will appear highlight) and click on the **Cancel Charge** button. The related charges will be automatically removed from the total amount billed for the delivery.

Note : This operation has an impact on the charge summary. Furthermore, a small mark appears in front of the selected item.

6.7.3.7 Editing quantities of returned or delivered items

This operation can be useful, especially when a customer decides to modify the quantity of items that must be delivered or picked up at the last minute. Normally, these quantities would be corrected in the *Delivery Return* 548 module.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").

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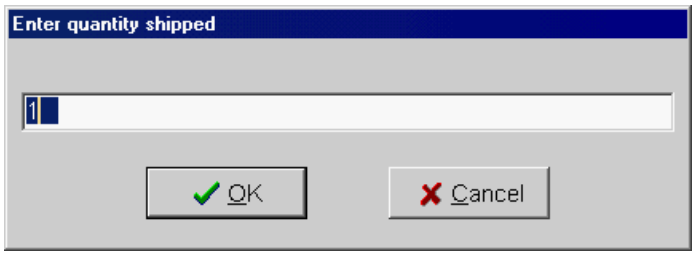
3 Click on **Edit**->**Courier Quantities**. A window appears.



Note : It is the quantity of items placed on the order that is displayed by default.

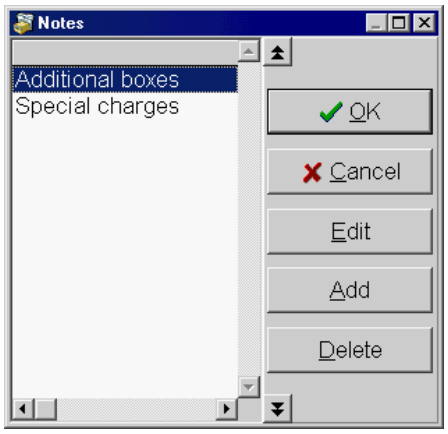
4 Enter the desired quantity of return or delivery items and press **OK**. The system automatically updates the courier quantities.

Note : This operation has an impact on the report of courier quantities and on the charge summary.

6.7.3.8 Adding predefined notes to a delivery and editing their content

Some notes can be added to a delivery, especially to justify the adjustment of delivery charges. The notes are predefined in the *System Information* module (see "Adding, editing or deleting the notes for deliveries 208") and can be modified here. These changes only apply to the current delivery and do not modify the original content of the notes in the *System Information* module.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **Edit**->**Delivery Notes**. A window appears.



Note : This window displays the title of the predefined notes

4 Select a title and press **OK**. A report window appears.
5 Edit the text if so desired and press **OK** when finished.

6.7.3.9 Canceling or restoring all delivery charges

This operation allows to cancel or restore all the charges of a delivery. It can be useful for rush deliveries that were delivered late or for deliveries that are not supposed to be billed to a customer according to certain terms in the contract.

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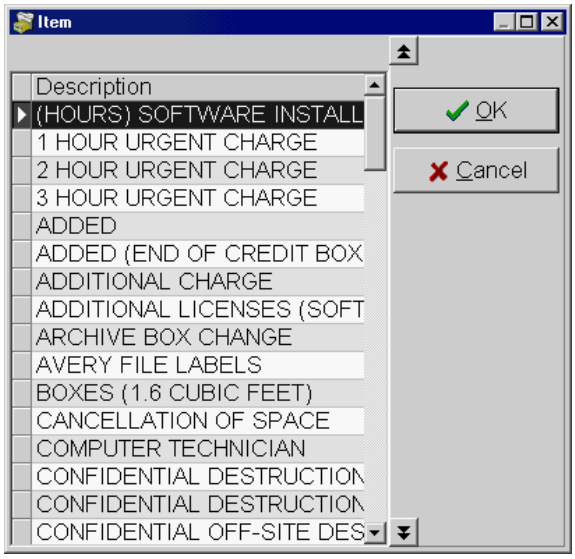
1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **Edit**->**Cancel All Charges**|**Restore All Charges**. A window appears and asks to confirm the operation.
4 Click on the **Yes** button to do so. When cancelling all the charges, the charge summary produced later will be empty and will indicate a nil balance.

6.7.3.10 Adding extra services to a delivery

When delivering items, unforeseeable events occur sometimes. When picking up boxes on the 5th floor of a customer's office, the elevator could be broken. So the driver will have to go up and down the stairs with the boxes. In that situation, the record center may charge additional labor to the customer.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **Edit**->**Add Line Item**. A window appears.



4 Select an item (it will appear highlighted) and press **OK**. A window appears and allows to select the department that will be charged.
5 Select the desired department and press **OK**. The system automatically updates the charge summary for the delivery.

Note : The department choice only applies for customers billed by department and for whom the billing parameters are set consequently in the *Customer Information* module.

6.7.3.11 Removing items from a delivery

In another operation performed in this module, it was possible to edit an item and to cancel the related charges without deleting the item from the delivery slip, from the charge summary or the list of ordered items. The current operation deletes the charges as well as the item.
1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Choose a delivery (see "Choosing a delivery to activate the module 613").
3 Click on **Edit**->**Remove Item**. A window appears.

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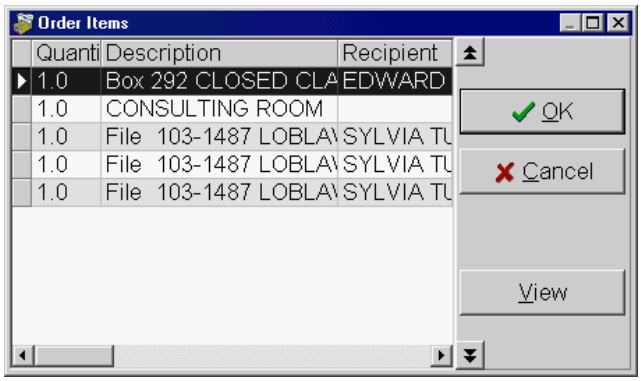


Note : This window displays the list of all the order items.

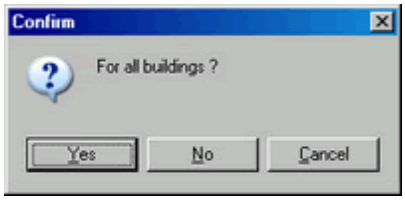
4 Select the item to be removed and press **OK**. A dialog box appears and asks to confirm the operation.
5 Click on the **Yes** button to do so. The system automatically updates the order items.

6.7.3.12 Viewing or printing some statistics

Item statistics

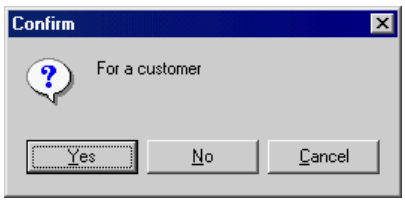
This report indicates the quantity of each product or service (order item) ordered during a given time period, either daily, weekly, monthly or annually.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**->**Item Statistics**->**Daily**|**Weekly**|**Monthly**|**Annually**
A dialog box appears.



To have a report that gives statistics for both buildings, press *Yes*. To have statistics for a specific building, press *No*. To abort the report, press *Cancel*. If you have pressed No, the system will prompt you to choose a building; select one (it will appear highlighted) and press **OK** .

Another window appears.



3 To have a report that gives statistics for a specific customer, press *Yes*. To have statistics for all customers, press *No*. To abort the report, press *Cancel*. If you have pressed No, the system will prompt you to choose a customer; select one (it will appear highlighted) and press **OK**. A

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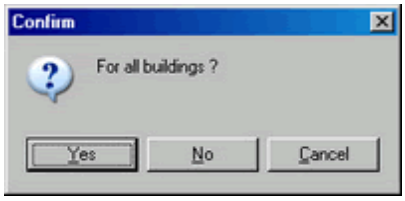
window appears and allows to specify a time period.

4 Enter a range of dates and press **OK**. The report is printed or displayed soon after.

Delivery statistics

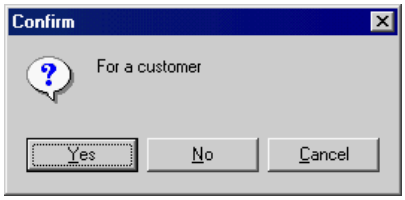
This report gives the quantity of deliveries performed for a specific courier type (regular, urgent, etc) and during a given time period, either daily, weekly, monthly or annually.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**->**Delivery Statistics**->**Daily**|**Weekly**|**Monthly**|**Annually**.

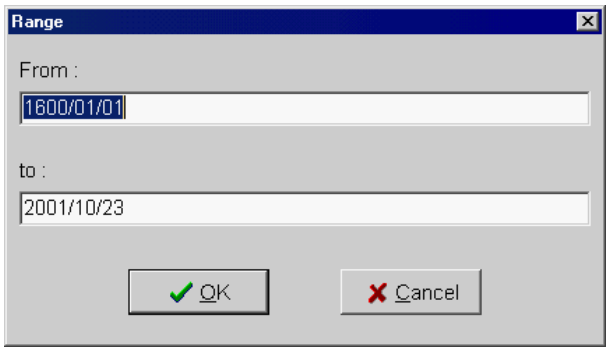


To have a report that gives statistics for both buildings, press *Yes*. To have statistics for a specific building, press *No*. To abort the report, press *Cancel*. If you have pressed No, the system will prompt you to choose a building; select one (it will appear highlighted) and press **OK** .

Another window appears.



3 To have a report that gives statistics for a specific customer, press *Yes*. To have statistics for all customers, press *No*. To abort the report, press *Cancel*. If you have pressed No, the system will prompt you to choose a customer; select one (it will appear highlighted) and press **OK**. A window appears and allows to specify a time period.



4 Enter a date range and press **OK**. The report is automatically printed or displayed.

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Statistics of invalid courier quantities

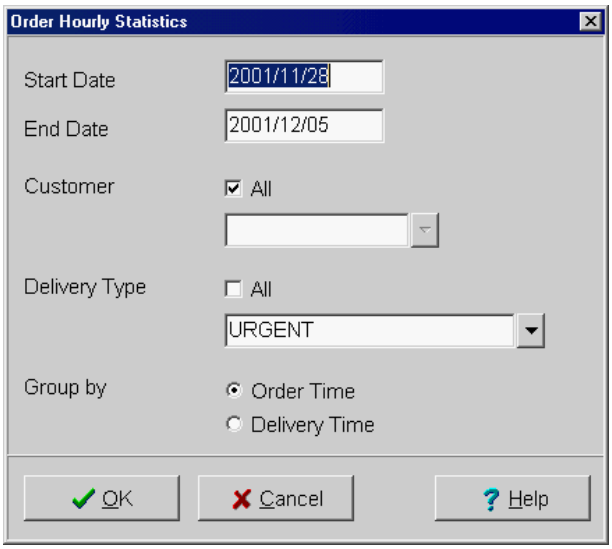
This report gives, for a given time period, the quantity of invalid courier on deliveries. For example, it can be a delivery on which there are more order items than delivery items.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**->**Invalid courier quantities**. A window appears and asks to choose a time period.
3 Enter an range of dates and press **OK**. The system automatically produces the report.

Statistics of order hours

This report allows to know, for a given time period and courier type or all courier types, the statistics of orders for all the customers or one customer, either by order hour or delivery hour.

1 Click on **Accounting**->**Delivery Billing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**->**Order Hourly Statistics**. A window appears.



Start Date, *End Date* : allows to select the range of dates for which the report is produced.
Customer : when this box is checked off, the system must consider the orders of all the customers. If not, it is necessary to click on the drop-down button and to select a specific customer.
Delivery Type : this field is like the previous one. According to the chosen option, the report will be produced for all the delivery types or for a specific delivery type.
Group by : this field allows to specify if the statistics must be produced according to the order hour or the delivery hour.

3 Set the desired parameters in the appropriate fields and press **OK**. The system automatically produces the report.

6.7.3.13 Changing the delivery type

It may occasionally be necessary to change the delivery type of a delivery for billing purposes.

1. Click on the **Accounting->Delivery Billing** module from the *Main Window*
2. Click on **Edit->Change Delivery Type**. A list of delivery types available to that customer

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appears (including those types identified as record center-only)
3. Select the desired delivery type and click **Okay**. The delivery type has been changed.
4. From the menu, select **View->Charge Summary**, to verify that the desired outcome has been achieved.

6.7.4 Delivery Type

6.7.4.1 Overview (Delivery Type)

When placing an order in the system, the delivery type will affect how the delivery is scheduled, delivered, and billed. The delivery type module enables you to configure these delivery types.

Available reports
- List of delivery types

Fields 622 **(see the next section)**

Tasks
- Adding or editing a delivery type 624
- Deleting a delivery type 624
- Viewing or printing the list of all delivery types 625

Distinctive menu options:

Edit menu
- Associate to multiple customers 625

Module window

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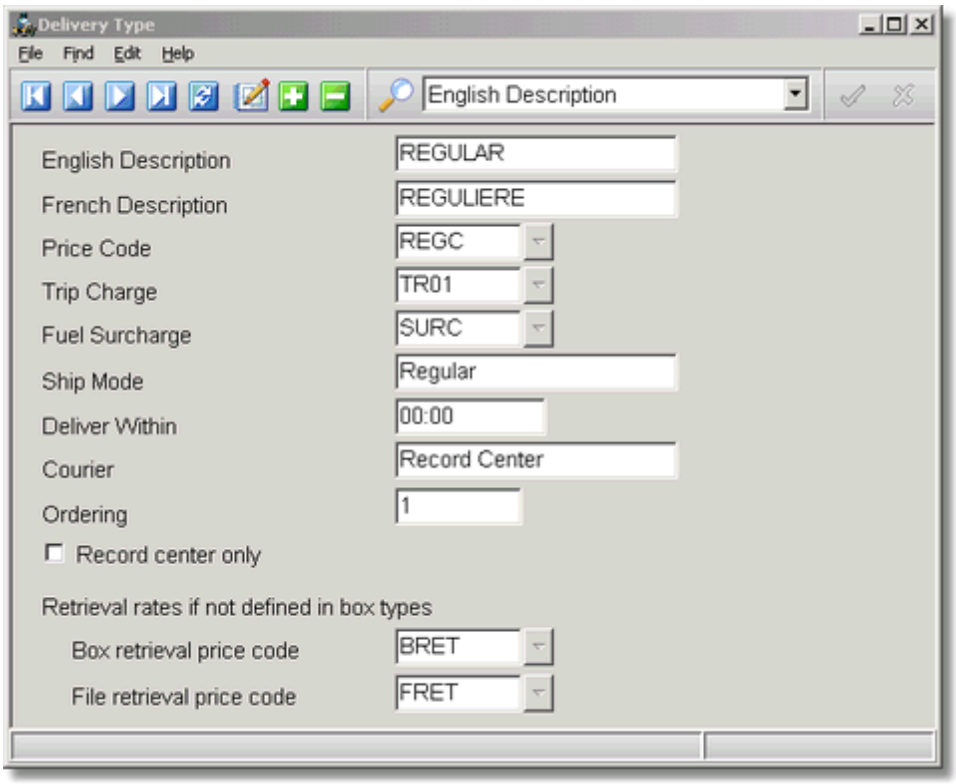

6.7.4.2 Fields (Delivery Type)

English Description
Field that allows to enter the English description of the delivery type
This description will appear everywhere in the system if the selected display language is English (ex: in the choice list of delivery types when placing orders).

French Description
Field that allows to enter the French description of the delivery type. This description will appear everywhere in the system if the selected display language is French (ex: in the choice list of delivery types when placing orders).

Price Code
Drop-down field associated to a list defined in the General Pricing module.

For physical deliveries, how this is applied depends on the courier billing method that the account is set to use.

Delivery: Applied once per delivery
Container: Applied once per outgoing container, based on the manually entered number
Item: Applied once per outgoing item
Item round trip: Applied once per item, both outgoing and incoming.

For electronic delivery methods (Fax and Imaging), this is the "Per page" charge.

Return price code
Drop-down field associated to a list defined in the General Pricing module.
Similar to the above price code, this is applied once per incoming item when courier billing is set to

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Item, and once per incoming container when set to Container.

Trip Charge
Drop-down field for assigning a price code defined in general pricing.
This price code is applied once per delivery. It is possible to specify a number of items to include 636 free in the trip charge. This does not apply if courier billing 229 is set to Container or Delivery. If all items are excluded from a delivery and there are no line items or returning items, the trip charge will not be applied.

Fuel Surcharge
Drop-down field for assigning a price code defined in general pricing.
This price code is applied once per delivery. You may modify the dollar amount of this price code frequently to reflect current fuel prices. If all items are excluded from a delivery and there are no line items or returning items, the fuel surcharge will not be applied.

Ship Mode
Choice field that can contain values "Regular", "By date", "By Time", "24 Hours" or "Half day rush".

This field determines when the order items are to be delivered. The delivery delays associated to each ship mode are an internal part of the system. The only exception is the ship mode "By Time" since the delay must be set in the next field.

Deliver Within
Numeric field effective only when the previous field is set to "By Time".
This field allow to specify a maximum time period when the order items have to be delivered to the customer.

Courier
Choice field that can contain values *"Record Center"*, *"External"* or *"Electronic"*.
This field allows to associate the delivery type to a courier type.
Record Center : the order items are delivered to the customer by the record center's driver.
External : the customer will send his own driver to the record center to pick up the order items.
Fax: the order items are sent by fax to the customer.
Imaging: the order items are sent electronically through the imaging module.

Note : The settings of this field have an impact on the Delivery Route module. All the orders whose related delivery type is associated to an *"External"* or *"Electronic"* courier cannot be added on a delivery route.

***Ordering**
Choice field that can contain values "1" to "65535" inclusive.
This field allows to specify the position of the delivery type in the choice list that appears when placing orders in the Order module.

Note: The delivery types for withdrawals lists (Ship mode - Regular and Courier - External) and the default delivery type for automatically scheduled orders (Ship mode - By Date and Courier - Record Center) can be specified in the options section of the Management->System Information 202 module. .

Retrieval rates if not defined in box types
Box retrieval price code
Drop-down field associated to a list that is part of the internal parameters of EDC.

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This field determines the charge associated to the retrieval of a box for that delivery type.

File retrieval price code
Drop-down field associated to a list that is part of the internal parameters of EDC.
This field determines the charge associated to the retrieval of a file for that delivery type.

Specific days only
When this option is selected, if the ship mode of this delivery type is *Regular*, deliveries of this type will only be scheduled for valid delivery days that fall on the days of the week specified.

For example, if a regular delivery would normally be scheduled for Monday, but the delivery type is specific for Tuesday, it will be scheduled for the next Tuesday which is a valid delivery date.

6.7.4.3 Adding or editing a delivery type

1. Click on **Accounting->Delivery Type** from the *Main window*.
2. Click on **Edit->Add** to add a new delivery type, or browse to the correct delivery type and click **Edit->Edit** to edit and existing one.
3. Enter or modify the desired information in the appropriate fields (see the previous section 622 for more details).
4. Click on the **Accept** button to save the addition or the modifications.

You may then want to associate the delivery type to multiple customers 625.

Note: Some delivery types are required by the system.

Deliveries created by the Rotation Schedule 357 will use the delivery type with the following parameters:

- Ship mode: By date
- Courier : Record center
- This is assigned as the *Scheduled order delivery type* in the System Information module 202

Deliveries created for destruction will use the delivery type with the following parameters:

- Ship mode: Regular
- Courier: External
- This is assigned as the *Withdrawal list delivery type* in the System Information module 202

6.7.4.4 Deleting a delivery type

It is not recommended to delete a delivery type because the operation cannot be undone and deletes all the data related to the delivery type. It could cause some problems if a customer needed explanations about an invoice, especially if it was related to an old delivery type that was deleted from the system.

One of the only reasons that could justify the deletion of a delivery type is if the delivery type is not frequently used or not used at all. Some statistic reports produced in the *Delivery Billing* module can help to evaluate how often it is used.

1. Click on **Accounting**->**Delivery Type** from the *Main window*.
2. Search the desired delivery type and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.

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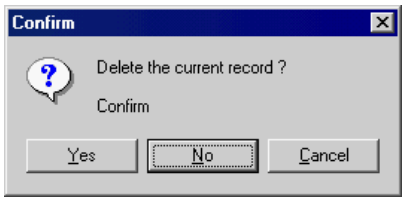
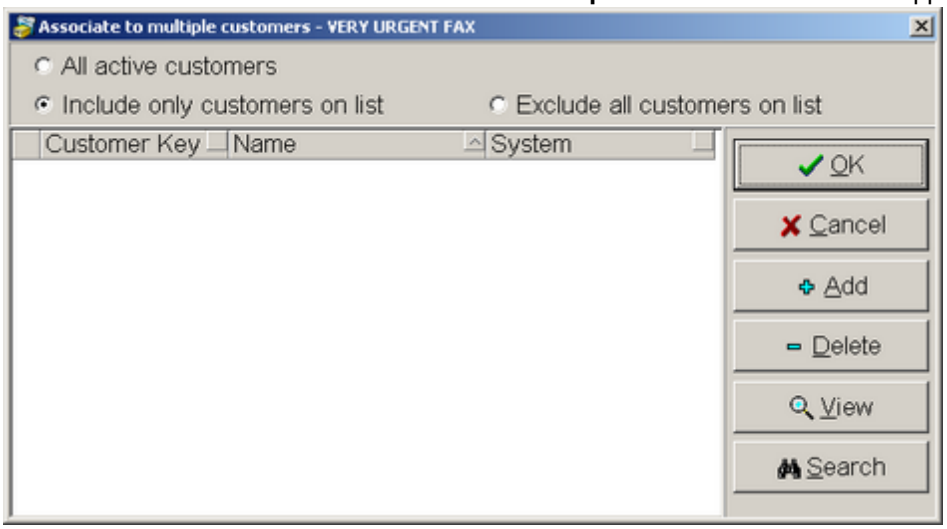


3 Click on the **Yes** button to confirm the deletion.

6.7.4.5 Associate delivery type to multiple customers

This operation will make the selected delivery type available to multiple customers in one operation. Note that it will be necessary to make these available to any authorized user who requires them but is not part of a user group that has access to *All* delivery types.

1. Open the **Accounting->Delivery Type** module
2. Navigate to correct delivery type
3. From the menu select **Edit->Associate to multiple customers**. A window appears.



4. Select which customers to associate the delivery type to, then click the **Ok** button.

6.7.4.6 Viewing or printing the list of all delivery types

1. Click on **Accounting->Delivery Type** from the *Main window*.
2. Click on **File->View report|Print report**. The list of delivery types appears on a report's window or is printed on the default printer.
3. Click on the **Close** button to end the viewing.

6.7.5 Box Type

6.7.5.1 Overview (Box Type)

The *Accounting->Box Type* module permits record centers to flexibly assign price codes to different storage and handling services base on the type of box (or tape). If a customer has the option uses box types 230 set to *No*, they will be billed based on the assigned volume of the box and various required price codes 639.

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Available reports
- List of all the box types

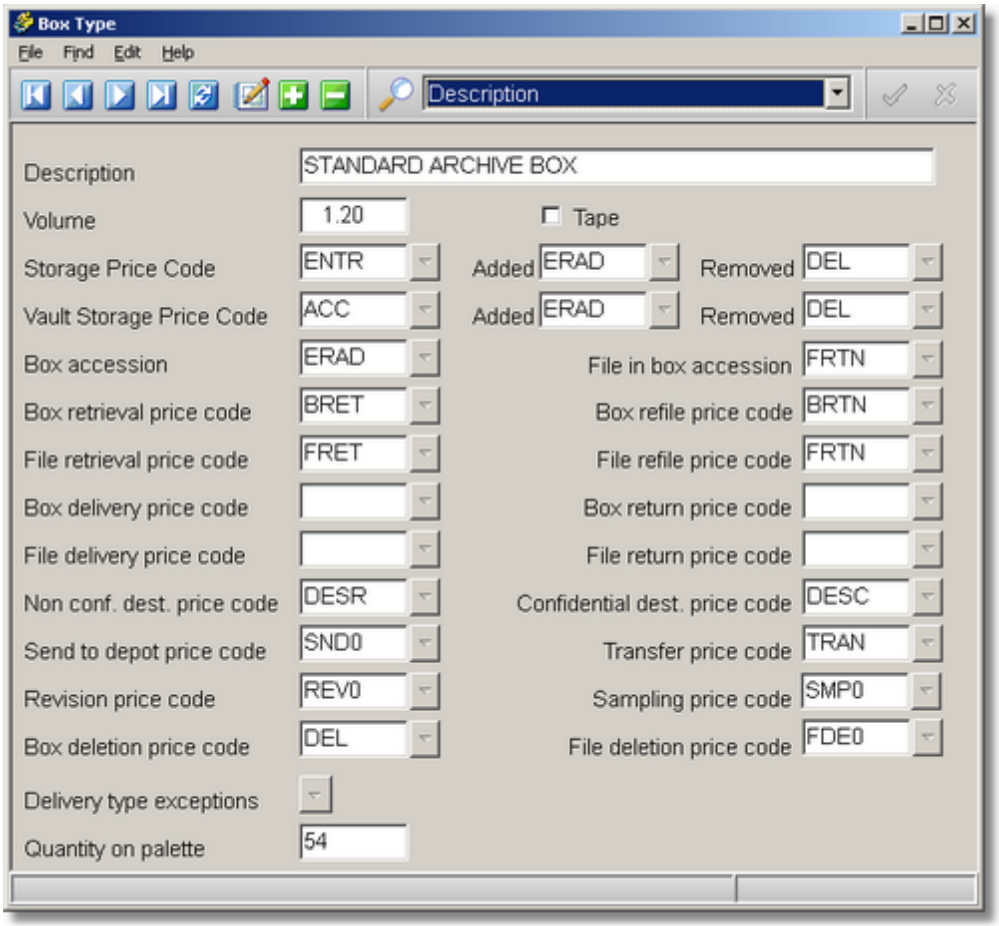
Fields627 **(see the next section)**

Tasks
- Adding or editing a box type629
- Deleting a box type631
- Viewing or printing the list of all box types632

Distinctive menu options:

Edit menu
- Copy and add631

Module window:



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6.7.5.2 Fields (Box Type)

Description
Alphanumeric field that can contain a maximum of 40 characters.
This field accepts a description of the box type. This description will appear every time the list of the box types is displayed, and it can also appear on location labels assigned to this box type.

Volume
Unique numeric value from "0.01" to "9999.00".

For customers who use box types (which is typically recommended), the "volume" of a box associates it with the
correct box type.

Customers who do not use box types are billed for storage by volume. The final digit of the volume is not considered significant in storage calculations; both will be billed as 0.8 cubic feet of storage. However, a box assigned a volume of 0.81 cannot go into a location of size 0.82. This is useful when boxes of similar volumes have different shapes.

Tape
Checking this box identifies a box type as a tape. This affects the type of labels that are printed, various descriptions, and other tape-specific parameters.

Storage Price Code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for regular storage fees for any item associated to that box type.

- **Added**
- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments for regular storage of newly-added boxes or tapes. Note that the actual charge is calculated by prorating the *Storage Price Code*.

- **Removed**
- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments to regular storage for newly-removed boxes or tapes. Note that the actual credit is calculated by prorating the *Storage Price Code*.

Vault Storage Price Code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for vault storage fees for any item associated to that box type.

- **Added**
- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments for vault storage of newly-added boxes or tapes. Note that the actual charge is calculated by prorating the *Vault Storage Price Code*.

- **Removed**
- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments to vault storage for newly-removed boxes or tapes. Note that the actual credit is calculated by prorating the *Vault Storage Price Code*.

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Accession
Drop-down field associated to a list defined in the General Pricing module.
This field accepts a price code for accession fees for items associated to that box type.

This charge is automatically applied the first time that a given box of this type goes to the *IN* state, on a delivery. It is not applied when boxes are created or imported directly in the *IN* state.

File in box accession
Drop-down field associated to a list defined in the General Pricing module.
This price code will be used in billing for filing new files into existing boxes of this type, through the return delivery module. It replaces the File refile price code.

This also offers a mechanism for billing for inter-filing.

Box retrieval price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the picking of boxes associated to that box type. This field can be overridden for specified delivery types 629.

Box refile price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the refilling of boxes associated to that box type.

File retrieval price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the picking of files in boxes associated to that box type. This field can be overridden for specified delivery types 629.

File refile price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the refilling of files in boxes associated to that box type.

Box delivery price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the delivery of boxes. It is only used when the customer's Courier billing 229 option is *By item type* or *Item type round trip.*

Box return price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the return of boxes. It is only used when the customer's Courier billing 229 option is *By item type.*

File delivery price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the delivery of files. It is only used when the customer's Courier billing 229 option is *By item type* or *Item type round trip.*

File return price code
Price code applied for the return of files when the customer's Courier billing 229 option is *By item type.*

Non conf. dest. price code
Price code applied for destruction of this type of box, with the disposal type *Non confidential*. This

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is typically used for destruction that is not done under record center supervision

Confidential dest. price code
Price code applied for destruction of this type of box, with the disposal type *Confidential*. Used for destruction done under supervision by the record center

Send to depot price code
Price code applied for the disposal of this type of box, with the disposal type *Send to depot* 729. This is typically used when when formerly active files are sent to the record center for semi-active storage.

Transfer price code
Price code applied for the transfer of this type of box, through the processing of a transfer list 415. This is for moving pallets of boxes to an external storage facility.

Revision price code
Price code applied for destruction of this type of box, with the disposal type *Revision* 729. Revisions involves sending pallets of boxes to the customer, who will decide what to do with them.

Sampling price code
Price code applied for destruction of this type of box, with the disposal type *Sampling*. Sampling involves keeping samples of the material and destroying the remainder.

Box deletion price code
Price code applied for permanent removal of boxes of this type, either through specifying a box as permanently out during order entry, or by processing a deletion list.

File deletion price code
Price code applied for the deletion of files from this type of box. This is not widely used.

Delivery type exceptions
Drop-down field associated to a list defined in the Delivery Type module.
The default *File retrieval price code* and *Box delivery price codes* can be overridden for any number of specified delivery types. (For example, you may wish to charge more for urgent client pick-ups.)
See Defining delivery type exceptions 630 for additional details.

Quantity on Pallet
Field associated with the number of boxes that can fit on a palette.

6.7.5.3 Adding or editing a box type

Before creating a box type it is essential to establish, in the *General Pricing* 632 module, the price codes that will be attached to the box types. Furthermore, if a customer wants to associate a box type to its items, a function must be activated in the *Customer Information* module (see the *Fields* 225 section of that module for more details).

1. Click on **Accounting**->**Box Type** from the *Main window*.
2. Click on **Edit**->**Add**|**Edit**.
3. Enter or modify the wanted information in the appropriate field (see the previous section 627 for more details on their content).
4. Click on the **Accept** button to register the addition or the modifications.

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6.7.5.4 Defining delivery type exceptions

When a box type is defined, exceptions may be applied for the retrieval rates used for specific delivery types. For example, it is possible to choose a higher price for the picking of boxes for rush deliveries. The following topic explains how to set up these retrieval rates.

Adding retrieval rates

Before associating delivery type exceptions with rates, retrieval rates should be added to the price code list for both boxes and files.

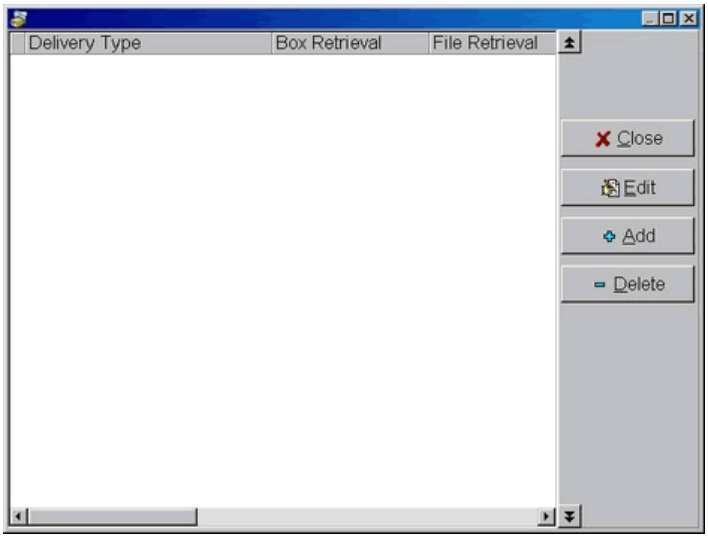
Here are examples of price codes that could be added :
- RUFR : Rush delivery file retrieval
- RUBR : Rush delivery box retrieval
- URFR : Urgent delivery file retrieval
- URBR : Urgent delivery box retrieval
- 1HFR : 1 hour delivery file retrieval
- 1HBR : 1 hour delivery box retrieval

Here are suggested settings :
Units - Units
Line Item - No
Customer specific - Unchecked
Order Entry - Unchecked
Courier - Unchecked
Group - Labour

Consult the Fields (General Pricing) 633 and Adding or editing a price 637 topics for more information on general price codes.

Adding, editing and deleting delivery type exceptions

1. Click on **Accounting**->**Box Type** from the *Main window*.
2. Click on **Edit**->**Edit**.
3. Click on the drop-down button beside the Delivery Type exceptions field. A window appears.



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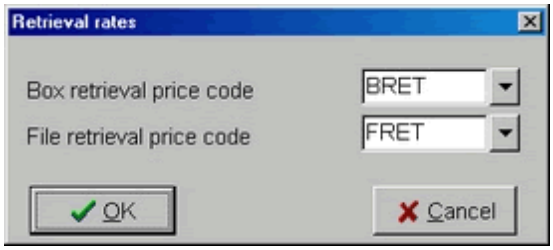
- To add an exception, press on the **Add** button. The list of Delivery Types available appears. Select one (it will be highlighted) and press **OK**. A window appears.



Select a price code from the list for boxes and files by pressing on the drop-down button beside the field, and press **OK**.

The changes made will be registered in the system and will overrule the ones in the Delivery Type 623 module. Take note that the changes will NOT appear in the *Delivery Type* module.

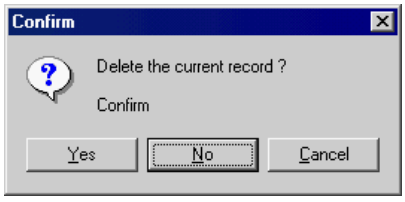
- To edit a delivery type exception, select a delivery type in the list (it will appear highlighted) and press on the **Edit** button. The same steps can be followed as when adding an exception (see above).
- To delete an exception, select a delivery type in the list (it will appear highlighted) and press on the **Delete** button. The changes will be registered in the system, but will NOT appear in the *Delivery Type* module.

4 When all the changes have been performed, press on the **Close** button. Press **OK**.

6.7.5.5 Deleting a box type

Before deleting a box type, it is essential to check that no inventory item is associated to the box type in question.

1 Click on **Accounting**->**Box Type** from the *Main window*.
2 Search the desired box type, keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion.

6.7.5.6 Copying and adding a box type

This function is used when the box type that needs to be created highly resembles an existing box type. The box type newly created can be modified in order to have its own billing settings.

1 Click on **Accounting**->**Box Type** from the *Main window*.
2 Click on **Edit**->**Copy and Add**
3 Enter or modify the wanted information in the appropriate field (see the previous section 627 for

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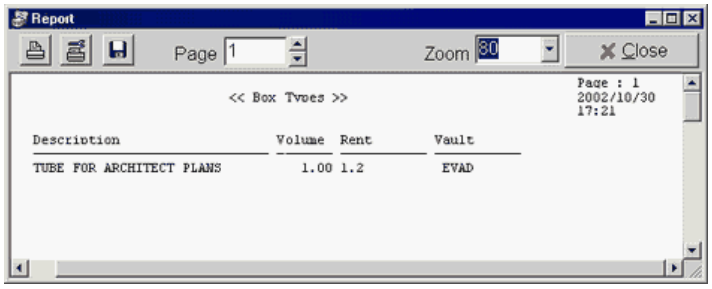
more details on their content).

4 Click on the **Accept** button to register the modifications.

6.7.5.7 Viewing or printing the list of all box types

1 Click on **Accounting**->**Box Type** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. The list of all the box types is automatically displayed in a report window or printed on the default printer.



3 Click on the **Close** button to end the viewing.

6.7.6 General Pricing

6.7.6.1 Overview (General Pricing)

The general pricing module permits you to define and manage the price codes that are applied to billable services, storage, and line-items. For a discussion of price codes, see *Assiging price codes to services and products* 637.

Once defined in the *Accounting->General Pricing* module, price codes can be overridden for individual customers in the *Customer->Customer Pricing* module.

Available reports

- list of general prices, including code and description

Fields 633 **(see the next section)**

Tasks

- Adding or editing a price 637
- Creating a line item 637
- Viewing or printing the list of all general prices 638

Distinctive menu options: (None)

Module window:

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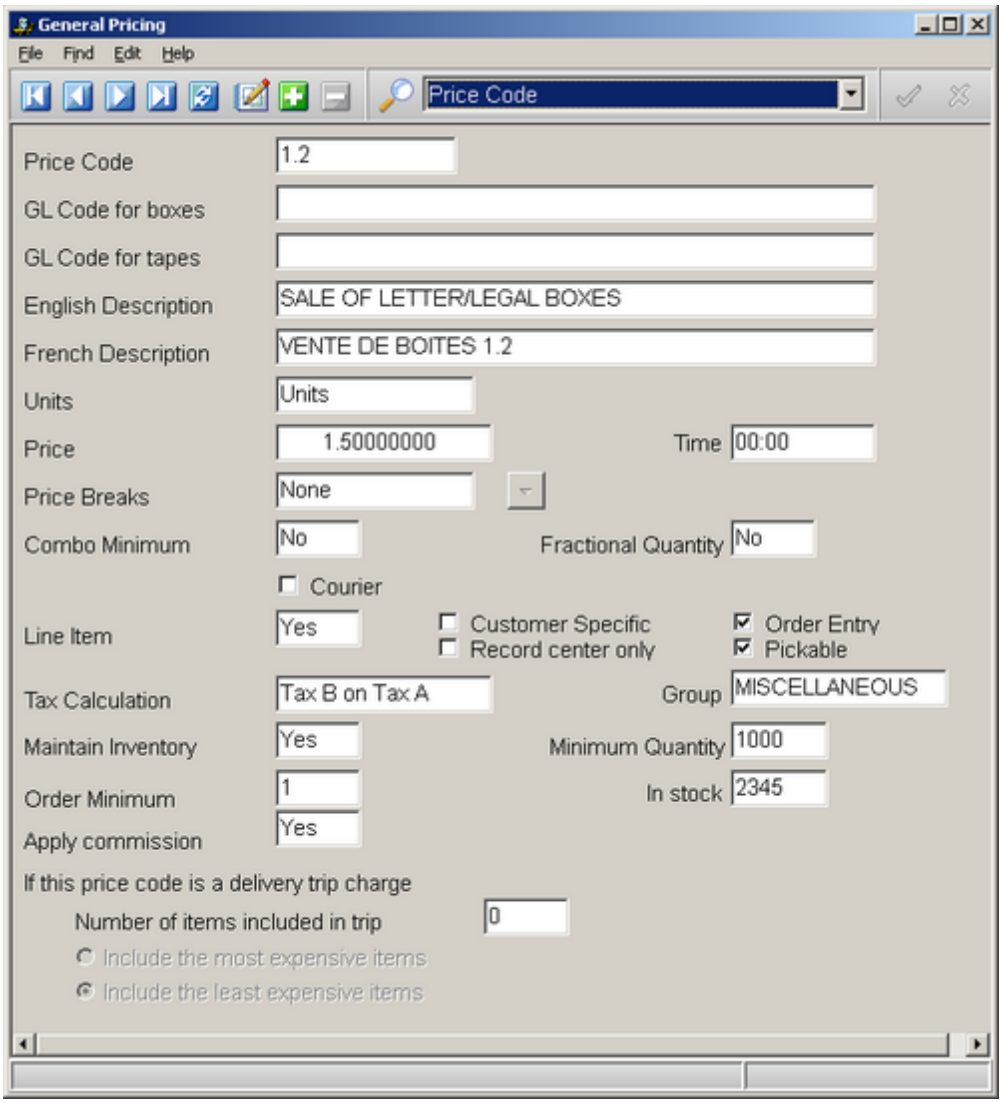

6.7.6.2 Fields (General Pricing)

Price Code
Unmodifiable alphanumeric field containing 4 characters that uniquely identify a price code in the system. Use a consistent logic when naming price codes, so that they can be more easily recalled. For example delivery of a size-1.0 box might be BD10.

GL Code for boxes
Alphanumeric field of up to 30 characters. This is used when exporting invoicing data from EDC to another accounting system and must be created in the accounting system (QuickBooks, MYOB) before being entered in the current field.
This is a General Ledger code that will allow the new accounting system to identify EDC items as boxes and to update its billing consequently (picking boxes, refilling boxes, storing boxes, etc).

GL Code for tapes
Alphanumeric field of up to 30 characters.
This field has exactly the same function than the previous field, Gb Code for boxes, but applies to items which are magnetic tapes.

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English Description
Alphanumeric field of up to 40 characters, used on English invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

French Description
Alphanumeric field of up to 40 characters, used on French invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

Units
Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.

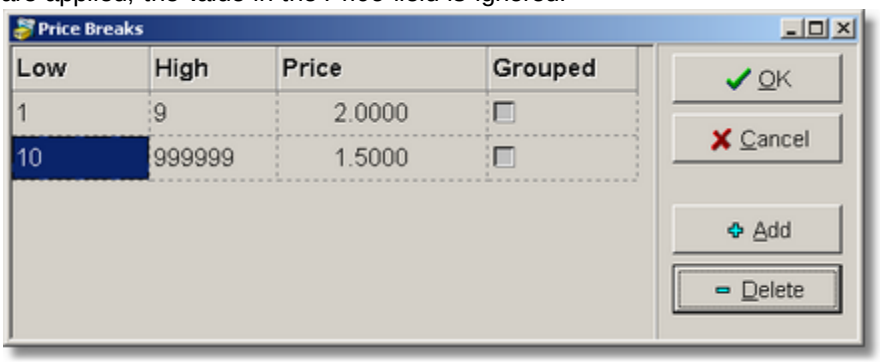
If this is set to **minutes**, the code's price is ignored and the amount will be calculated as the value of the *Time* field for this price code, multiplied by the value of the Hourly Rate field defined in the Customer Information 225 module. For example, if the *Time* field is set to 00:15 (15 minutes) and the hourly rate for the customer is $40, $10 will be charged each time the price code is applied.

Price
Numeric value indicating the cost of one unit of the price code. Note that this does not apply if the *Units* fields is set to minutes or *Price Breaks* is not set to *None*.
The "unit price" expression is used here. This is because the prices are defined in unit terms, but also in minute, cubic feet, linear feet or megabyte terms.

Time
When the *Units* field is set to *Minutes*, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.

Price Breaks
Choice field that can contain values "Standard", "None" or "Tiered".

The price breaks allows the cost per unit to vary with the number of units ordered. If price breaks are applied, the value in the *Price* field is ignored.



- *Standard :* all units are charged at the same rate, but this rate will depend on the number of units delivered. With the above example, 20 units would cost 20x$1.50 = $30.
- *Tiered :* multiple tiers of pricing exist in the same calculation. In this case, 20 items would cost $2 each for the first 9 items and $1.50 each for the next 11, for a total of $34.50
- None: all items char

Note : For "Standard" and "Tiered", it is necessary to click on the drop-down button of the field, in order to specify price breaks for which parameters are the following :

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- *Low and High :* range or boundaries of a price break.
- *Time* (present when the Units field is set to "Minutes") : time charged for the items included in the price break, according to the hourly rate of the customer.
- *Price* (present every time except when the Units field is set to "Minutes") : amount charged for each item included in the price break.

- *Grouped :* If selected, the same cost is applied for part or all of the group defined by the range. (e.g., with $10 for delivery of 1-5 items, $10 will be charged whether 1 or 5 items are delivered.) With standard price breaks and grouping, only the applicable tier is charged. With tiered price breaks and grouping, the current tier is charged, along with all those below it.

Combo minimum
Use of this option is not generally recommended for record centers new to EDC, as clearer methods for achieving similar results now exist. It affects how tiered price breaks are applied on box and file delivery handling.

Example :
3 boxes and 2 files are ordered. Price breaks for the file delivery code are $2.50 for the first, $1.75 for the rest.

If this field is set to *No*, the cost is $2.50 + $1.75, corresponding to files 1 and 2.
If this field is set to Yes, the cost is $1.75 + $1.75 for items 4 and 5.

Boxes are counted before files.

Fractional Quantity
When this field is set to *No*, only whole quantities can be entered. For example, it is possible to order 1 item but not 0.5 items.

Line Item
When this field is set to *Yes*, the price code will appear on the list of choices that can be added to a delivery (Delivery Billing 611 module). Depending on the following options, they may be available at order entry and they may be made customer specific, and not available for order by ActiveWeb.

- **Customer specific**

Applies to line items. When this box is checked, it indicates that the line item will only appear for this specific customer (the customer can then be chosen by clicking on the drop down button. To add a customer to the list, press on the Add button; select the customer from the list and press OK. To delete a customer from the list, select a customer - it will appear highlighted - and press on the Delete button.)

- **Order Entry**

Applies to line items. When this box is checked, the item can be added to an order (Order 501 module).

- **Record Center Only**

Applies to line items. These items can not be seen by customers for ordering via ActiveWeb. examples might include credits.

- **Pickable**

When a line item is placed on an order, if it is flagged as "pickable" it will be included in the picking list on the PDT. If an order includes only return items and line items that are not pickable, the order will be considered a "Service only" order for billing purposes, and will go straight to the verified state

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- bypassing the circulation process.

Courier
When this box is checked, it indicates to the system that it is a courier price. Delivery fees are then charged for this item. Furthermore, this price code appears in a choice list when creating delivery types (Price Code field in the Delivery Type module).

Tax Calculation
Choice field that can contain values ""Not Taxable", "Tax A Only", "Tax B Only", "Tax A plus Tax B" or "Tax B on Tax A".
It allows to determine how the applicable taxes will be calculated (these taxes are defined in the Building 186 module).

Group
Choice field that can contain values "Supplies", "Storage", "Labor", "Courier", "Inventory List", "Imaging", "Open shelf", "Shredding/recyc", or "Miscellaneous".

This determines which header the charges will be grouped under on the invoice.

Maintain Inventory
When this field is set to *Yes* the system updates the quantity of items in stock with each delivery.

Minimum Quantity
Numeric choice field that can contain values "0" to "9999999" inclusively.
When inventory levels drop to this level, a message will appear prompting users to replenish the stock.

Order Minimum
Numeric choice field that can contain values "0" to "65535" inclusively.
Fewer items less this cannot be ordered by customers.

In stock
Numeric choice field that can contain values "0" to "9999999" inclusively.
It indicates the quantity of items actually available in stock. As soon as an item is ordered, this quantity is updated. When the stocks are renewed, it is possible to enter the bought quantity.

Apply Commission
When this field is set to *Yes*, revenue due to this price code is included in the calculation of commissions on the commissions report for the salesperson listed in the *Customer Information* module.

If this price code is a delivery trip charge

Number of items included in trip
Numeric choice field that can contain values "0" to "999999" inclusively.
This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the *Customer Information* module is not set to *"Delivery".* These items may be of different types.

Include the (most | least) expensive items
Choice field. If different item types with different delivery costs are delivered, this will determine which ones to include in the cost first.

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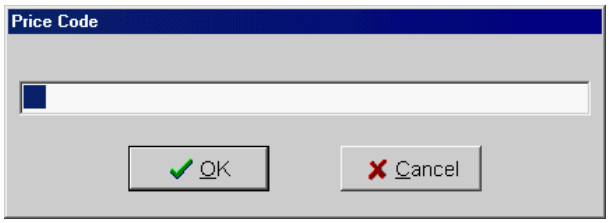
6.7.6.3 Adding or editing a price

Adding a price

1 Click on **Accounting**->**General Pricing** from the *Main window*.
2 Click on **Edit**->**Add**. A window appears.



3 Enter the code that will identify the new price and press **OK**. A dialog box is displayed.

4 Click on the **Yes** button to confirm the addition.
5 Enter the desired information in the appropriate fields (see the previous section 633 for more details) and click on the **Accept** button.

Editing a price

1 Click on **Accounting**->**General Pricing** from the *Main window*.
2 Perform a search to display the desired price code on the screen and click on **Edit**->**Edit**.
3 Modify the desired information in the appropriate fields (see the previous section 633 for more details) and click on the **Accept** button.

6.7.6.4 Creating a line item

Price codes may be configured so that they can be added directly to invoices and deliveries. They can also be made available to specific customers or to all customers at order entry.

In the **Accounting->General Pricing** module, add a new price code 637, or edit an existing one as follows:

1. Specify the description of the price code, as it should appear at order entry and on the invoice.
2. Ensure that the Line item 635 field is set to *Yes*.
3. If it should be accessible from the *Orders->Order* module, check the *Order entry* box.
4. If it should not be available for order by the customer on line, check the *Record center only* box.
5. If it is available to some but not all customers, check the *Customer specific* box, and select the appropriate customers.
6. If inventory is maintained, set *Maintain inventory* to *Yes*, and specify the *Order minimum*, the *Minimum quantity* before warning to re-order, and the current quantity *In stock*.

6.7.6.5 Assiging price codes to services and products

There are three sources of charges on invoices:

1. Storage costs are calculated based on the inventory.

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2. Charges may be added directly to the invoice, either manually 603 or as periodic invoice items 646 .
3. All other charges are collected from the deliveries 611 dated during the invoice period.

Inventory charges
If customers do not use box types, then their storage charges are based on their volume of boxes stored in regular storage and in vault storage. These charges and descriptions are set up through required price codes 639.

Most customers are set up for billing using box types. In this case, price codes for storage and services can be assigned for each box type in the box type module 625.

A minimum invoice adjustment can be applied at the customer 227 or departmental invoice 651 level. These adjustments are typically applied to the storage costs alone, but can be applied to the entire invoice including service if desired.

Image and electronic document storage is billed by megabyte per year using a required price code 639 (ISTR). Open shelf file storage (ETOR) is billed based on the total length of shelf locations for open file storage 387 allocated to a customer.

It is also possible to assign price codes to locations 378 that are reserved for a specific customer. This will be applied on each storage invoice, whether or not the space is occupied.

Invoice charges
Examples of charges added directly to the invoice might include web license, other periodic flat-rate charges, and one-time credits.

Charges for delivery of goods or services
All other charges are collected on deliveries for billing. For example, if you re-box a damaged box for a customer and they are to be billed for this service, EDC will automatically create a delivery to apply these charges to. Similarly, if you perform work such as inventorying boxes for a customer, you would create a delivery to bill for this time.

Price codes for various **box and file handling operations** are specified in the box type module 627, and in the required price codes 639 for customers not set up to use box types. Charges associated with the delivery are mapped in the delivery type module 621. Where item delivery handling charges are taken from (box type, delivery type, default price codes, or none) depends on the courier billing 229 setting for the customer

Price codes for **shredding operations** are assigned in the shredding container module 442.

Items that do not have EDC bar codes on them are ordered and delivered as **line items**,et up directly in the general pricing 632 module and overridden in customer pricing 640 as necessary.

6.7.6.6 Viewing or printing the list of all general prices

1 Click on **Accounting**->**General Pricing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. The report is displayed or printed soon after.

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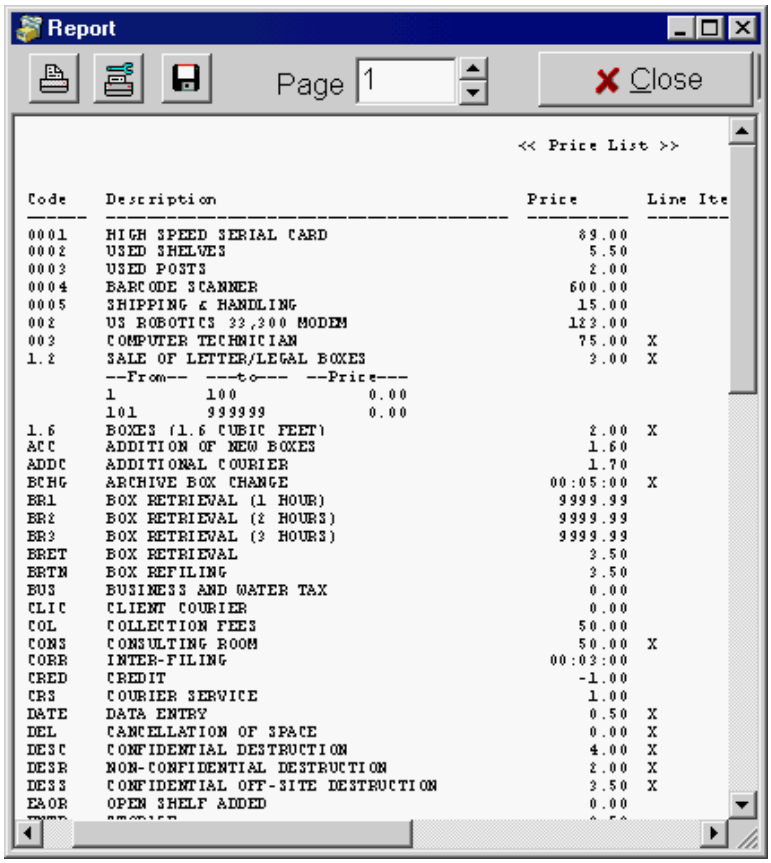
Report
Page 1
Close
<< Price List >>
Code Description Price Line Ite
0001 HIGH SPEED SERIAL CARD 89.00
0002 USED SHELVES 5.50
0003 USED POSTS 2.00
0004 BARCODE SCANNER 600.00
0005 SHIPPING & HANDLING 15.00
002 US ROBOTICS 33,200 MODEM 123.00
003 COMPUTER TECHNICIAN 75.00 X
1.2 SALE OF LETTER/LEGAL BOXES 3.00 X
--From-- ---to--- --Price---
1 100 0.00
101 999999 0.00
1.6 BOXES (1.6 CUBIC FEET) 2.00 X
ACC ADDITION OF NEW BOXES 1.60
ADDC ADDITIONAL COURIER 1.70
BCHG ARCHIVE BOX CHANGE 00:05:00 X
BR1 BOX RETRIEVAL (1 HOUR) 9999.99
BR2 BOX RETRIEVAL (2 HOURS) 9999.99
BR3 BOX RETRIEVAL (3 HOURS) 9999.99
BRET BOX RETRIEVAL 3.50
BRTN BOX REFILING 3.50
BUS BUSINESS AND WATER TAX 0.00
CLIC CLIENT COURIER 0.00
COL COLLECTION FEES 50.00
CONS CONSULTING ROOM 50.00 X
CORR INTER-FILING 00:03:00
CRED CREDIT -1.00
CRS COURIER SERVICE 1.00
DATE DATA ENTRY 0.50 X
DEL CANCELLATION OF SPACE 0.00 X
DESC CONFIDENTIAL DESTRUCTION 4.00 X
DESR NON-CONFIDENTIAL DESTRUCTION 2.00 X
DESS CONFIDENTIAL OFF-SITE DESTRUCTION 3.50 X
EAOR OPEN SHELF ADDED 0.00

3 Click on the **Close** button to end the viewing.

6.7.6.7 Required price codes

Here are the price codes that are required by **EDC** for proper billing. These price codes should not be erased under <u>any</u> circumstances.

Code	Description	Comment
1.2	Box Sale Price Code	(this price code will always apply when selling a box)
ACC	New Box Price Code	
BCHG	Box Change Price Code	Box was replaced with a new box (cardboard)
BRET	Box Retrieval Price Code	(default price code)
BRTN	Box Refile Price Code	(default price code)
CORR	Inter File Price Code	Inserting a document within a file
DEL	Deletion Price Code	Permanent removal (out fee)
DESC	Confidential Destruction Price Code	(default price code)
DESR	Non-Confidential Destruction Price Code	(default price code)
EAOR	Open Shelf Addition Price Code	Addition of an open shelf file (default price code)
ENTR	Storage Price Code	Regular storage (used when billing by volume) (default price code)
ENTV	Vault Storage Price Code	Storage in vault (used when billing by volume) (default price code)

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ERAD Reg Addition Price Code Additions and deletions during an invoice period. The cost for

these items is taken from StoragePrice Code and VaultStoragePrice Code (default price code)

ERSU Reg Deletion Price Code Additions and deletions during an invoice period. The cost for

these items is taken from StoragePrice Code and VaultStoragePrice Code (default price code)

ETOR Open Shelf Storage Price Code Open shelf storage

EVAD Vault Addition Price Code Additions and deletions during an invoice period. The cost for

these items is taken from StoragePrice Code and VaultStoragePrice Code

EVSU Vault Deletion Price Code Additions and deletions during an invoice period. The cost for

these items is taken from StoragePrice Code and VaultStoragePrice Code

FRET File Retrieval Price Code (default price code)

FRTN File Refile Price Code

IDNL Image Download From RC Price Code

ISTR Electronic Document Storage Price Code Annual rate per MB, includes both images and EDM documents.

IUPL Image Upload To RC Price Code

MAIN Labour Price Code Mandatory labour price code. It must be defined as a 1 minute quantity in the general pricing module.

MINV Minimum Invoice Cost Adjust Price Code

OIAC Open Shelf ACC Price Code Non-inventoried open shelf accession

OIFN Open Shelf Refile Price Code Inventoried open shelf file return and accession

OIFR Open Shelf Retrieval Price Code Inventoried open shelf file retrieval

OSDL Open Shelf Delivery Price Code Only used when courier billing is by item type

OSRT Open Shelf Return Price Code Only used when courier billing is by item type

RET Return Courier Price Code ReturnCourierPrice Code

SRCH Search Price Code For non track file and box searches

SURC Surcharge Price Code Miscellaneous additional charge

FTKO File Tracking Charge Price Code Tracking files within boxes (charges per units within box)

FBA0 File Accession Price Code Replaces the refiling fee for addition of files to existing boxes.

TRAN C TransferPCode

Note: The default price codes should not be erased, yet one should create price codes that fit the record center's needs.

6.7.7 Customer Pricing

6.7.7.1 Overview (Customer Pricing)

When creating invoices, EDC consults this module in determining how to apply a price code. If the given price code is not defined for the customer in this module, it will apply the pricing from the **Accounting->General Pricing** module.

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Available reports
- list of customer prices, including code and description

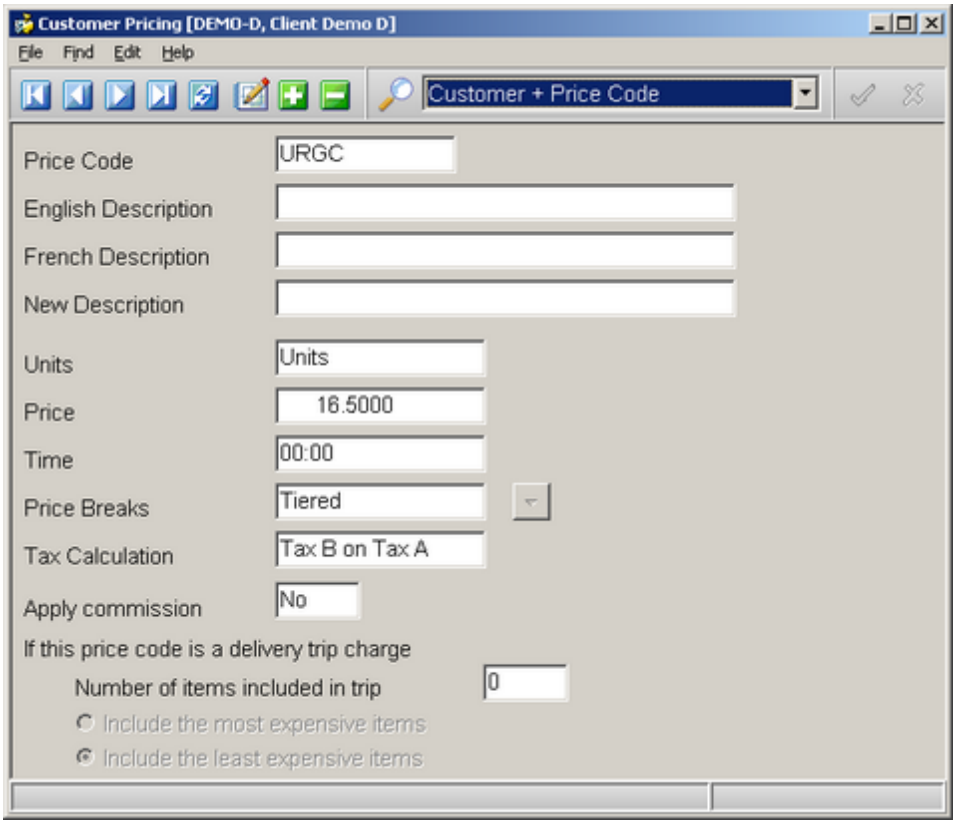
Fields642 **(see the next section)**

Tasks
- Adding, editing or deleting a price for one customer643
- Copying prices for one customer644
- Viewing or printing the prices one customer646

Distinctive menu options:

File menu
- Copy price codes644
- Global rate change645

Module window:



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6.7.7.2 Fields (Customer Pricing)

Price Code
Unmodifiable alphanumeric field containing 4 characters that uniquely identify a price code in the system. Use a consistent logic when naming price codes, so that they can be more easily recalled. For example delivery of a size-1.0 box might be BD10.

English Description
Alphanumeric field of up to 40 characters, used on English invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

French Description
Alphanumeric field of up to 40 characters, used on French invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

New Description
Alphanumeric field of up to 40 characters, used to override the description (in the customer's default language) on the invoice

Units
Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.

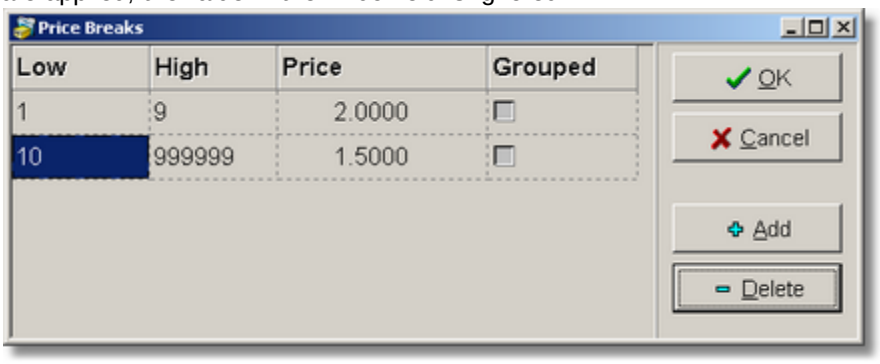
If this is set to **minutes**, the code's price is ignored and the amount will be calculated as the value of the *Time* field for this price code, multiplied by the value of the Hourly Rate field defined in the Customer Information 225 module. For example, if the *Time* field is set to 00:15 (15 minutes) and the hourly rate for the customer is $40, $10 will be charged each time the price code is applied.

Price
Numeric value indicating the cost of one unit of the price code. Note that this only applies if *Price Breaks* is set to *None*, and the *Units* is not set to minutes.

Time
When the *Units* field is set to *Minutes*, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.

Price Breaks
Choice field that can contain values "Standard", "None" or "Tiered".

The price breaks allows the cost per unit to vary with the number of units ordered. If price breaks are applied, the value in the *Price* field is ignored.



- *Standard :* all units are charged at the same rate, but this rate will depend on the number of units

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delivered. With the above example, 20 units would cost 20x$1.50 = $30.
- *Tiered :* multiple tiers of pricing exist in the same calculation. In this case, 20 items would cost $2 each for the first 9 items and $1.50 each for the next 11, for a total of $34.50
- None: all items char

Note : For "Standard" and "Tiered", it is necessary to click on the drop-down button of the field, in order to specify price breaks for which parameters are the following :

- *Low and High :* range or boundaries of a price break.
- *Time* (present when the Units field is set to "Minutes") : time charged for the items included in the price break, according to the hourly rate of the customer.
- *Price* (present every time except when the Units field is set to "Minutes") : amount charged for each item included in the price break.

- *Grouped :* If selected, the same cost is applied for part or all of the group defined by the range. (e.g., with $10 for delivery of 1-5 items, $10 will be charged whether 1 or 5 items are delivered.) With standard price breaks and grouping, only the applicable tier is charged. With tiered price breaks and grouping, the current tier is charged, along with all those below it.

Apply Commission
When this field is set to *Yes*, revenue due to this price code is included in the calculation of commissions on the commissions report for the salesperson listed in the *Customer Information* module.

If this price code is a delivery trip charge

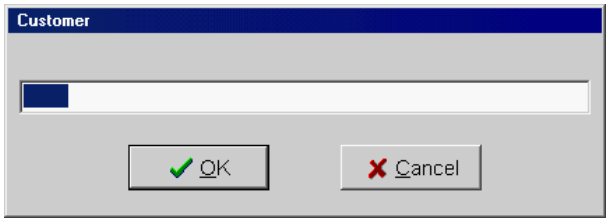
Number of items included in trip
Numeric choice field that can contain values "0" to "999999" inclusively.
This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the *Customer Information* module is not set to *"Delivery".* These items may be of different types.

Include the (most | least) expensive items
Choice field. If different item types with different delivery costs are delivered, this will determine which ones to include in the cost first.

6.7.7.3 Adding, editing or deleting a price for one customer

1. Click on **Accounting**->**Customer Pricing** from the *Main window.*
2. Perform one of the following operations :

   - To add a price, click on **Edit**->**Add**. A window appears.



Enter the code of the desired customer and press **OK**. A new window appears.

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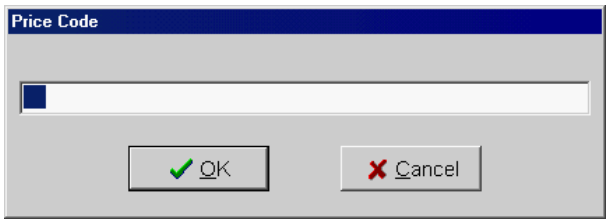


Enter a code to indicate where to start in the selection list and press **OK**. A window appears, containing a list of all the codes defined in the *General Pricing* 632 module. Select a code that will identify the price everywhere in the system and press **OK**. Enter the desired information in the appropriate fields and click on the **Accept** button.

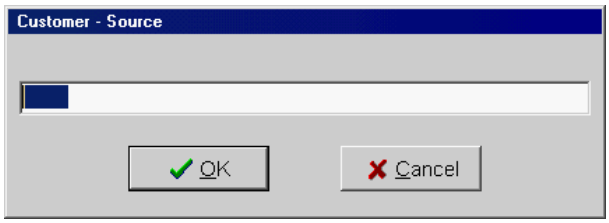
- To modify a price, find the desired price code and keep it on the screen. Click on **Edit**->**Edit**. Enter the desired information in the appropriate fields and click on the **Accept** button.

- To delete a price, find the desired price code and keep it on the screen. Click on **Edit**-> **Delete**. Confirm the operation by clicking on the **Yes** button of the dialog box that appears.

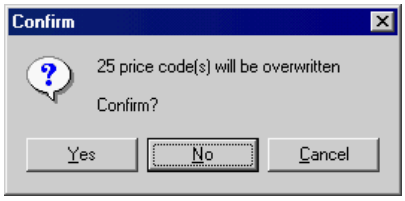
6.7.7.4 Copying prices for one customer

This operation allows to copy all the prices for a customer in order to grant the same prices to another customer. It can be useful when a customer signs a contract with the record center and has the same terms as another customer.

1 Click on **Accounting**->**Customer Pricing** from the *Main window*.
2 Click on **File**->**Copy Price Codes**. A window appears.



3 Enter the code of the customer for whom the prices will be copied and press **OK**. A new window appears and allows to select the target customer.
4 Enter the code of the desired customer and press **OK**. A dialog box is displayed.



Note : This dialog box indicates the number of price codes already defined for both customers (source and target) and which are similar.

5 Click on the **Yes** button to confirm the operation. The price codes of the target customer are updated.

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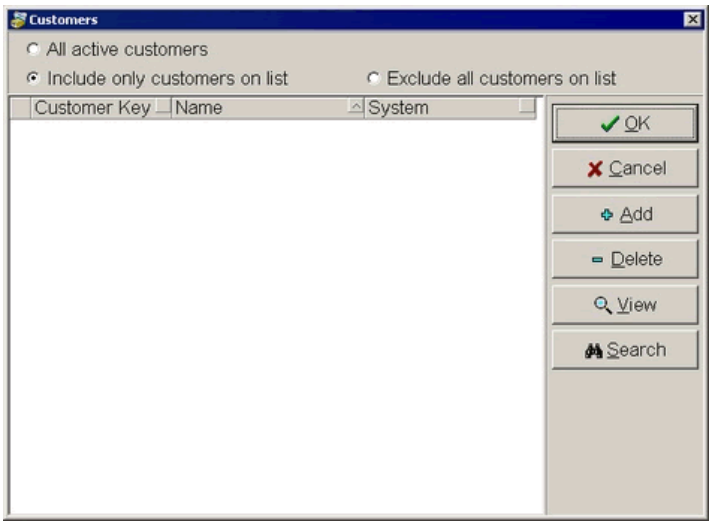
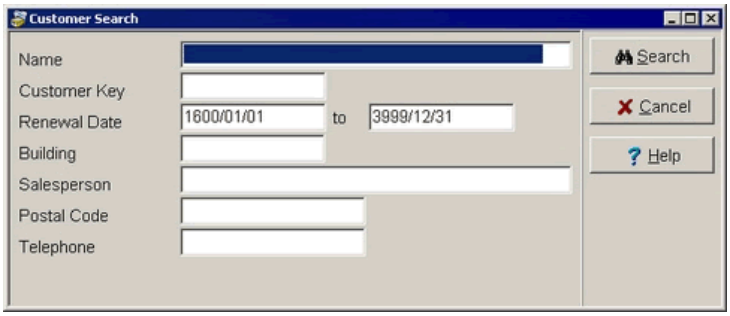
6.7.7.5 Performing a global customer rate change

1 Click on **Accounting**->**Customer Pricing** from the *Main window*.
2 Click on **File**->**Global Rate Change**. A window appears.



3 Select an option (All active customers | Include only customers on list | Exclude all customers on list).
4 To edit the list of customers:

- To add customers on the list, press the **Add** button. Enter the customer key or press **OK** to have the list of customers (select a customer, it will appear highlighted, and press **OK**). Press **OK**.
- The customer will be added to the list.
- To delete a customer from the list, select the desired customer (it will appear highlighted) and press the **Delete** button.
- To search for a customer, press the **Search** button. A window appears.



Enter the desired search criteria and press on the **Search** button. All the customers that correspond to the specified criteria are included in the list.

- To view the information of a customer, select the desired customer (it will appear highlighted) and press the **View** button.

5 When the list is complete, press **OK**. A window appears.

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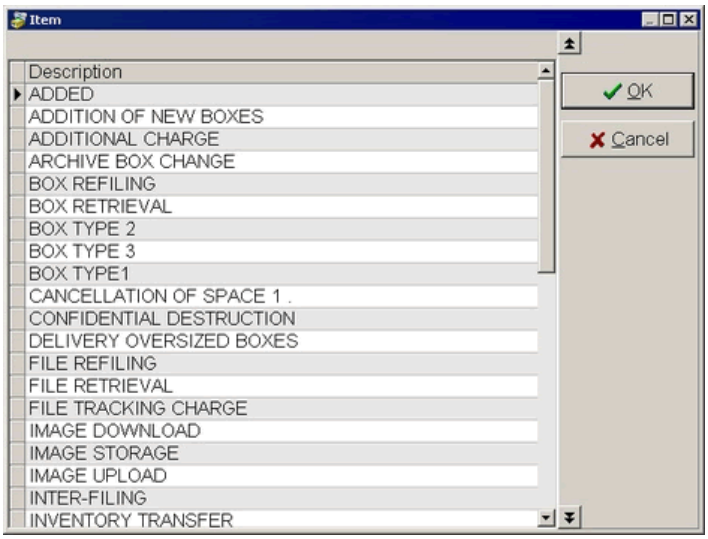
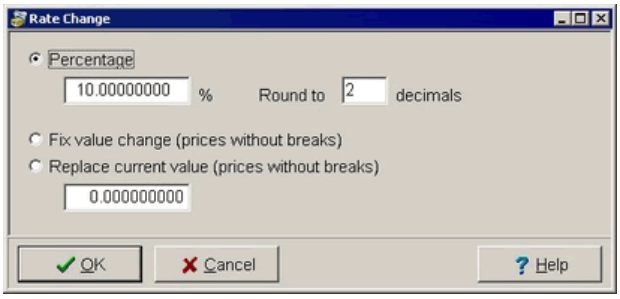


6 Select the desired price codes (they will appear highlighted) and press **OK**. A window appears.



7 Select the desired option and enter the different values (when needed). Press **OK**.
8 A confirmation message appears. Press *Yes* to continue, *No* or *Cancel* to abort the operation.
9 Enter your password and press **OK**.
10 If the changes could not be done, a report appears with the different errors.

6.7.7.6 Viewing or printing the prices one customer

1 Click on **Accounting**->**Customer Pricing** from the *Main window*.
2 Click on **File**->**View Report**|**Print Report**. A window appears and allows to select a customer.
3 Enter the code of the desired customer and press **OK**. The report is automatically printed or displayed.

6.7.8 Periodic Invoice Item

6.7.8.1 Overview (Periodic Invoice Item)

In automating your invoicing, you may wish to apply periodic charges directly to invoices, such as a web access fee. This module permits you to apply charges daily, weekly, monthly, or annually.

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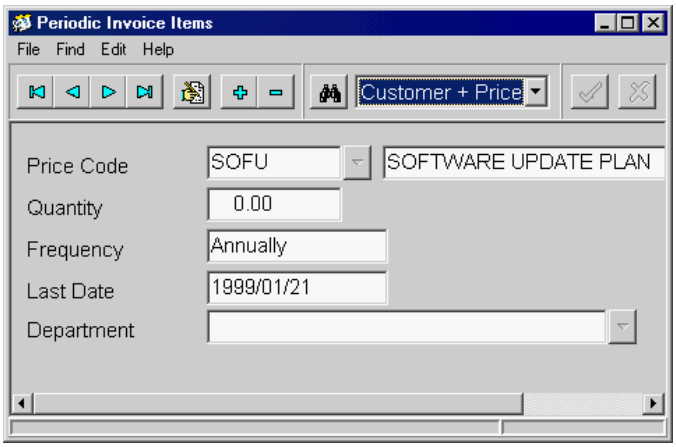
Available reports
- list of periodic invoice items, either for one or for all customers

Fields647 **(see the next section)**

Tasks
- Adding a periodic invoice item 648
- Editing a periodic invoice item 649
- Deleting a periodic invoice item 649
- Viewing or printing the list of periodic invoice items 649

Distinctive menu options:
- None

Module window:



6.7.8.2 Fields (Periodic Invoice Item)

Price Code
Drop-down field associated to a list defined with the internal parameters of the system.
It allows to select a price code and consequently, to associated some charges to the item (the charges are defined in the *Customer Pricing* 640 module).

Quantity
Choice field containing values "0.00000000" to " 99999999.99999999" inclusive.
It allows to enter the quantity of items to bill periodically.

Frequency
Choice field containing the values "Daily", "Weekly", "Monthly" or "Annually".
It allows to select a frequency for which the item will appear on invoices of the concerned customer.

- For "Annually", the item is charged once during the year.
- For "Monthly", the item is charged 12 times during the year. It will appear once on monthly invoices, 3 times on trimestrial invoices, etc.

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- For "Daily", the item is charged as often as there are days in the billing period.

Ex : For monthly invoices such as the invoice of November (31 days), the item is charged 31 times; for the invoice of October (30 days), the items is charged 30 times, etc.

- For "Weekly", the item is charged as often as there are complete weeks (7 entire days) between the *Last Date* the item was billed (see the next field) and the end date of the billing period.

Ex: Lets consider a billing period from October 1st to October 31st and an item whose last billing date was September 30th (it can then be charged again from October 1st). From October 1st to October 31st, there are 31 days. The periodic item will appear 4 times on the invoice, for 4 x 7 entire days (4 x 7 = 28 that fits in 31).
Lets consider the same item but a billing period from November1st to November 30th. The system does not consider the billing period but retains that the item was last charged on September 30th. It calculate that there are 61 days between October 1st and November 30th. The periodic item will appear 8 times on the invoice, for 8 x 7 entire days (8 x 7 = 56 that fits in 61).

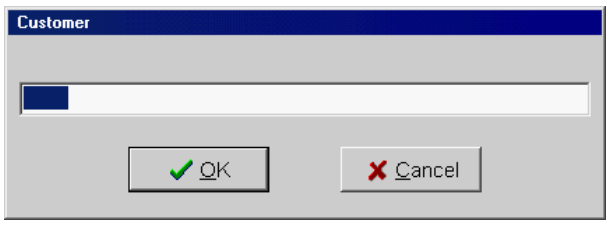
Last Date
Field with a predefined date mask defined in the *System Information* module.
It indicates when the items has been billed for the last time. According to the settings of the previous field, it is possible to evaluate the next time the item will be billed.

Note : This date can be changed manually if necessary. When an invoice is created in the *Invoicing* module, this field is automatically updated, in order to notify that the periodic item has been billed. But if, for any reasons, the related invoice is deleted and not replaced, the value of this field will not be changed consequently. It is then necessary to stay vigilant when billing these items.

Department
Drop-down field associated to a list defined in the *Departments* module.
It allows to select the department to be charged. This field is displayed only for customers who are billed by department (see the description of the *Billing* 225 field in the *Customer Information* module).

6.7.8.3 Adding a periodic invoice item

1. Click on **Accounting**->**Periodic Invoice Item** from the *Main window*.
2. Click on **Edit**->**Add**. A window appears.



3. Enter the code of the desired customer and press **OK**.
4. Enter the significant information in the appropriate fields (see the previous section 647 for more details) and click on the **Accept** button when finished.

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6.7.8.4 Editing a periodic invoice item

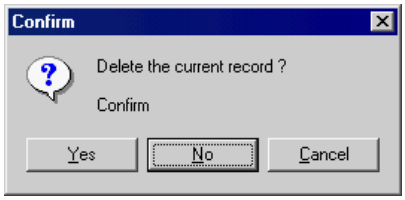
A periodic invoice item can be modified as many times as desired. For example, the record center could have to modify the billing frequency of a periodic invoice item, in order to respect some new contract clauses for a customer.

1. Click on **Accounting**->**Periodic Invoice Items** from the *Main window*.
2. Find the desired item and keep it on the screen. Click on **Edit**->**Edit**.
3. Perform modifications in the appropriate fields (see "Fields 647" in the current module for more details). Click on the **Accept** button to save changes.

Note : All the fields can be modified, except for the *Description* field.

6.7.8.5 Deleting a periodic invoice item

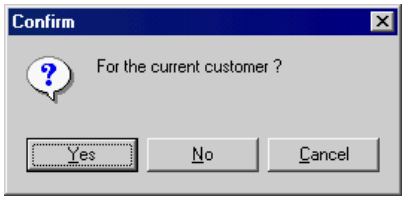
1. Click on **Accounting**->**Periodic Invoice Items** from the *Main window*.
2. Find the desired item and keep it on the screen. Click on **Edit**->**Delete**. A dialog box appears.



3. Click on the **Yes** button to confirm the deletion. The item will not be billed periodically to the customer.

6.7.8.6 Viewing or printing the list of periodic invoice items

1. Click on **Accounting**->**Periodic Invoice Items** from the *Main window*.
2. Click on **File**->**View Report**|**Print Report**. A dialog box appears.



3. Click on the **Yes** button to include only the current customer on the report or click on the **No** button to produce a general report for all the customers. The chosen report will be printed or displayed automatically.

Note : The report produced here indicates the name of the customers, a description of the periodic items, their quantity and billing frequency.

6.7.9 Departmental Invoicing

6.7.9.1 Overview (Departmental Invoicing)

Larger organizations may have departments that manage their budgets independently. The present module makes it possible to configure departments or groups of departments to receive invoices separate from the global invoice. (The for this, the invoicing option in the *Customer->customer information* module should be *Departmental*.

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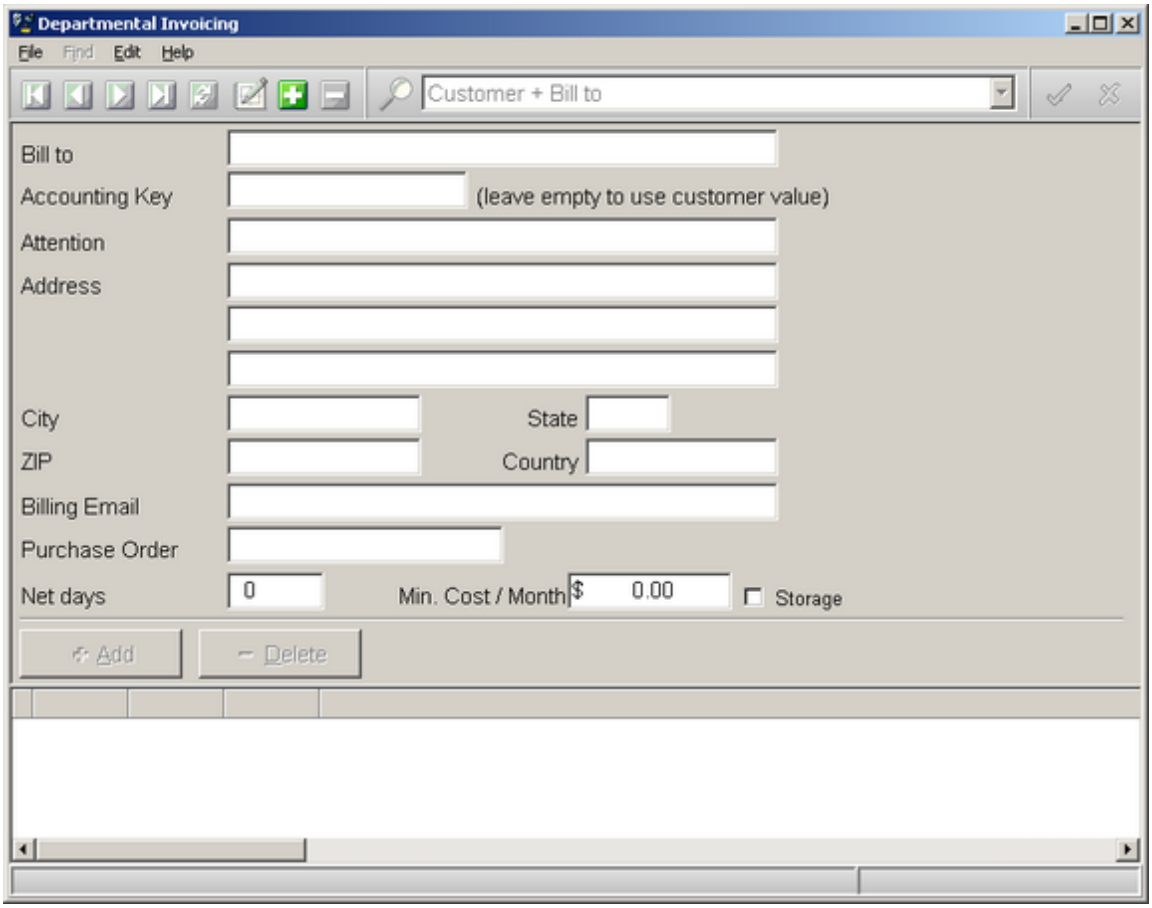
Available reports
- list of departments billed separately for one customer

Fields[651] **(see the next section)**

Tasks
- Establishing the parameters of departmental invoicing for a customer[651]
- Editing or canceling parameters of departmental invoicing for a customer[652]
- Viewing or printing the list of departments billed separately for a customer[653]

Distinctive menu options:
- None

Module window:



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6.7.9.2 Fields (Departmental Invoicing)

Bill to
This field allows to indicate the name of the company (or division, subsidiary, etc) that will appear on the invoice.

Accounting Key
If you export your invoices 602 to an accounting system and this system uses a different key per departmental invoice for this customer, you may enter an accounting key of up to 30 characters here. If left blank, the value defined in customer information will be used.

Attention
This field indicates the name of the person to whom the invoice is sent to. It can be an individual or a service, such as account payables.

Address/City/Province/Postal Code/Country
Main address of the recipient for the invoice.

Purchase order
This field allows to associate a purchase order to the invoice. This procedure is common for big organizations.

Billing email
This field contains the billing email address of the specific department (see related information in the Billing section of the *Customer information module* --- Invoice Format and Billing)

Net days
This field allows to specify when the invoice has to be paid (maximum of days) to the record center.

Min. Cost/Month Storage
Numeric field that can contain the values "0.00" to "99999.99".
This field allows to enter a minimum amount to bill every month.

- When the *Storage* box is not checked, it is the minimum cost to charge for all the services, including storage.
- When the *Storage* box is checked, it is the minimum cost to charge for storage only, not for the other services.

Ex : For a specific customer and month, the system count 5$ for storage fees and 10$ for general fees (picking, refilling, labour, etc).
If a 20$ minimum cost is set for that customer without checking off the *Rent* box, he will be charged for a total amount of 20$. If the *Rent* box is checked off, the customer will be charged for 30$ (20$ of minimum storage fees + 10$ of general fees).
If the system has counted 30$ for storage fees and 25$ for general fees for that customer, the 20$ minimum cost would not apply. The customer should be charged for 55$.

Departments (unlabelled section)
This section allows to add or remove the departments that will be billed on this invoice. (Charges to departments that are not assigned to departmental invoices are included in the general invoice.)

6.7.9.3 Establishing the parameters of departmental invoicing for a customer

1 Click on **Accounting**->**Departmental Invoicing** from the *Main window*.
2 Click on **Edit**->**Add**. A window appears.

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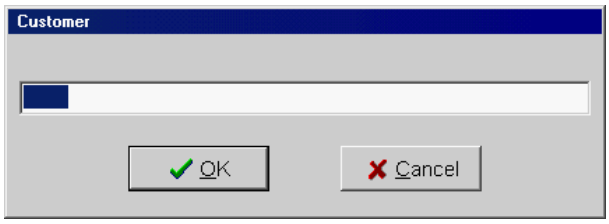
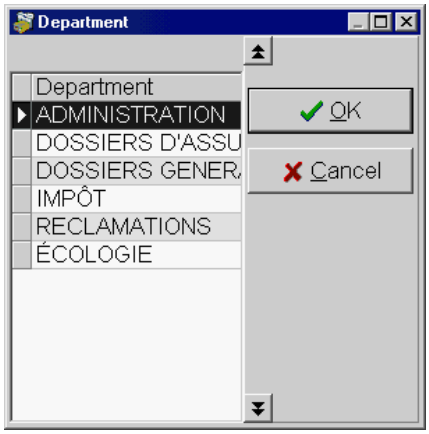


3 Enter the code of the desired customer and press **OK**.
4 Enter the desired information in the appropriate fields (see the previous section 651 for more details)
5 Establish the selection as follows :

- To add a department click on the **Add** button in the *Department* section. A window appears.



Select a department (it will appear highlighted) and press **OK**. Repeat the operation to add other departments. The departments selected here will be displayed in the *Department* section, at the bottom of the current module.

- To remove a department, select it in the *Department* section and click on the **Delete** button. The selected department will disappears from the list.

6 Click on the **Accept** button when finished.

6.7.9.4 Editing or cancelling parameters of departmental invoicing for a customer

Editing a selection

1 Click on **Accounting**->**Departmental Invoicing** from the *Main window*.
2 Search the desired selection. When it is displayed on the screen click on **Edit**->**Edit**.
3 Edit the desired parameters in the appropriate fields (see "Fields 651" in the current module) and click on the **Accept** button to register the modifications.

Cancelling a selection

1 Click on **Accounting**->**Departmental Invoicing** from the *Main window*.
2 Search the desired selection. When it is displayed on the screen click on **Edit**->**Delete**. A dialog box appears.

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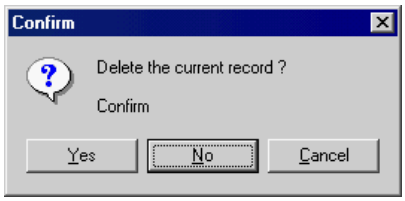
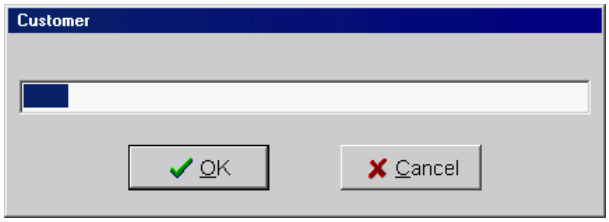


3 Click on the **Yes** button to confirm the deletion. All the departments that were included in the selection become available for billing with the main account of the customer.

6.7.9.5 Viewing or printing the list of departments billed separately for a customer

1 Click on **Accounting**->**Departmental Invoicing** from the *Main window*.
2 Click on **File**->**View Report|Print Report**. A window opens.



3 Enter the code of the desired customer and press **OK**. The report is printed or displayed soon after.

6.7.10 Customer Volume Usage

6.7.10.1 Overview (Customer Volume Usage)

This module provides various reports of storage volume usage.

Available reports
- See below, see the *Report* 364 module

Fields
- None

Distinctive menu options:

File menu
- View | Print customer volume (By cubic feet | By size) 654 Report includes storage, and amount added or removed by date.
- View | Print total volume (By customer | By box type) 656

Module window

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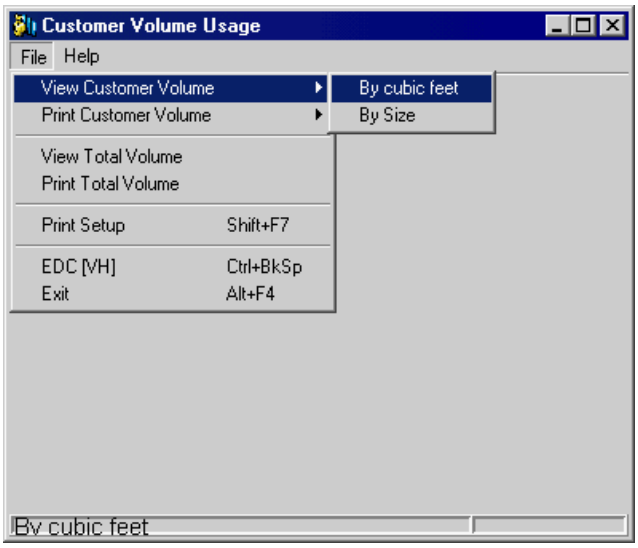
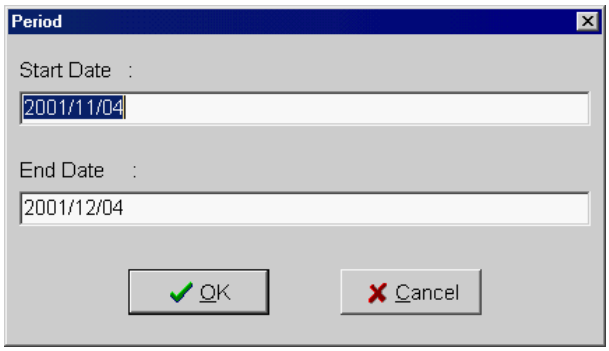


6.7.10.2 Viewing or printing volume usage for one customer

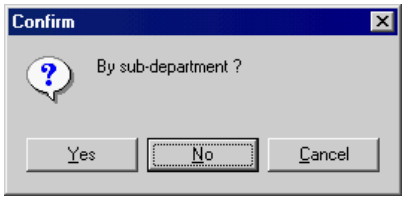
These reports allow to evaluate the space usage of each customer. It is possible to view if a customer gets different size of boxes or to know the distribution of the occupation rate between departments of a customer.

Quantity of cubic feet stored by a customer for a specific period

1. Click on **Accounting**->**Customer Volume Usage** from the *Main window*.
2. Click on **File**->**View Customer Volume**|**Print Customer Volume**->**By cubic feet**. A window appears and asks to specify which customer is concerned.
3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter an interval of dates and press **OK**. A dialog box appears.



5. Click on the **Yes** button if the report must be sorted by sub-department. The report is

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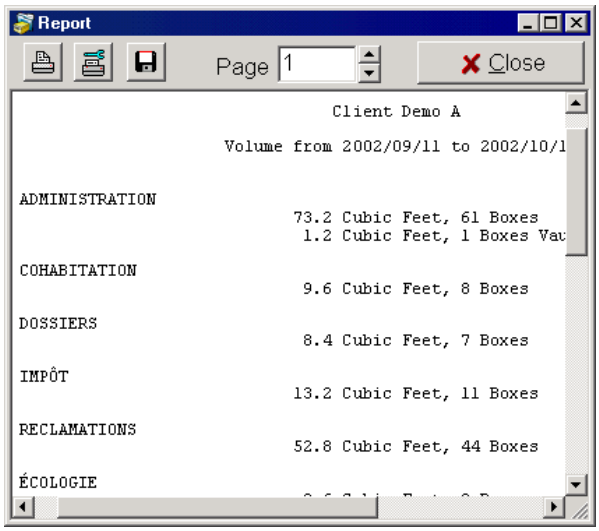
automatically printed or displayed as follows :

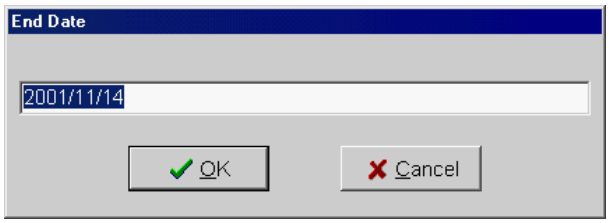


Note : The interval of dates previously entered allows to view the quantity of cubic feet added to the volume in storage since the beginning of this period. The date of the addition for the first box is specified, because it is not necessarily the start date of the period.

6 Click on the **Close** button to end the viewing.

Quantity of documents stored by a customer for a specific date, sorted by box size

1 Click on **Accounting**->**Customer Volume Usage** from the *Main window*.
2 Click on **File**->**View Customer Volume**|**Print Customer Volume**->**By Size**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the desired customer and press **OK**. A new window appears.



4 Enter a date and press **OK**. The report is automatically printed or displayed as follows :

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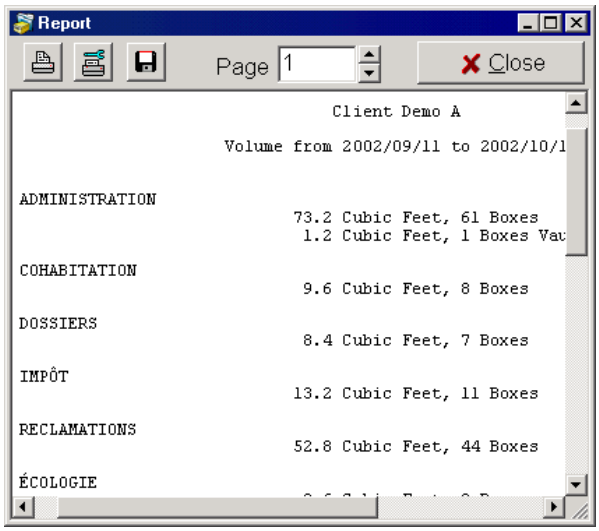
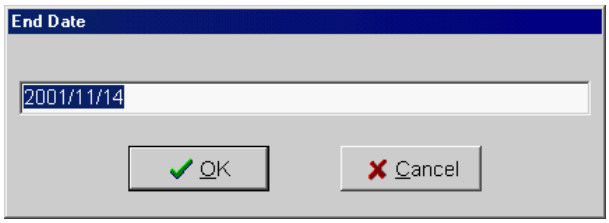


5 Click on the **Close** button to end the viewing.

6.7.10.3 Viewing or printing total volume usage

This report allows to know the total volume in storage for each customer for a specific date. This volume will be used for invoicing.

1 Click on **Accounting**->**Customer Volume Usage** from the *Main window*.
2 Click on **File**->**View Total Volume**|**Print Total Volume**. A window appears.



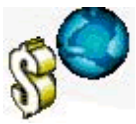
3 Enter a date and press **OK**. The report is printed or displayed automatically.
4 When viewing the report, click on its **Close** button to end the operation.

6.7.11 RimsLink Pricing

6.7.11.1 Overview (RimsLink Pricing)

The *RimsLink Pricing* module enables the *Billing* record center to map the price codes used on shared customer invoices at the *Service* record centers to those in use at the *Billing* record center. To access the module window, select a *Service* record center from the list.

See the procedures section for instructions on setting up RimsLink 94.



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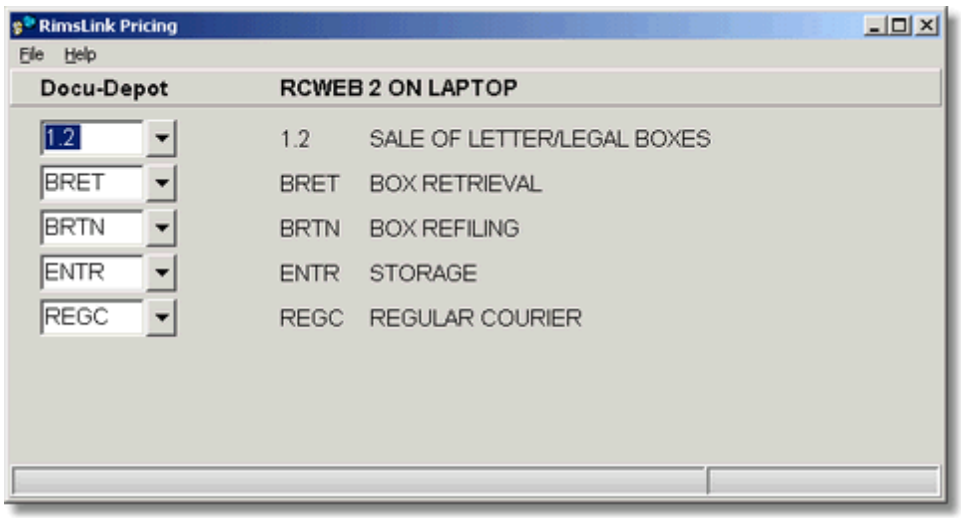
Available Reports
(None)

Destinctive menu options
- Open Service record center 657

Fields
The window of the *RimsLink Pricing* module contains a table of price codes from the invoices of customers shared with the specified record center. Each row allows you select the price code from your record center that matches the price code and description for the Service record center on the right.

- **(Column 1)** Select the local price code to match the Service record center code in column 2
- **(Column 2)** *Service* record center price codes, with description as they appear on invoices.

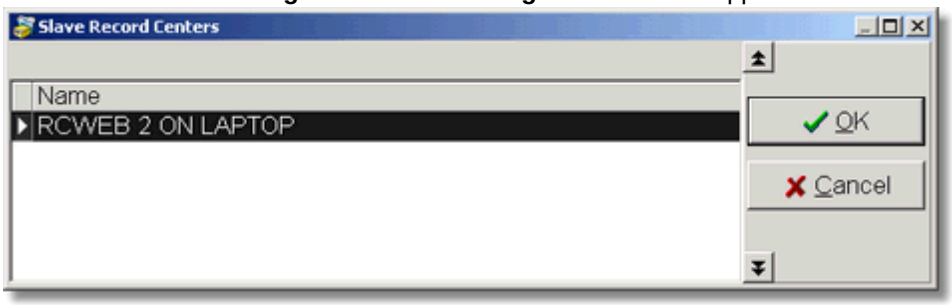
Module window



6.7.11.2 Open service record center to map pricing

The *RimsLink Pricing* module maps relevant price codes between the *Billing* record and each *Service* record center. Select which record center to map as follows:

From the Main window:
1. Select the **Accounting->RimsLink Pricing** module. A list appears.



2. Double-click the desired record center. If the Service record center can be contacted with the parameters entered during RimsLink setup 94, the module will open to the appropriate mapping.

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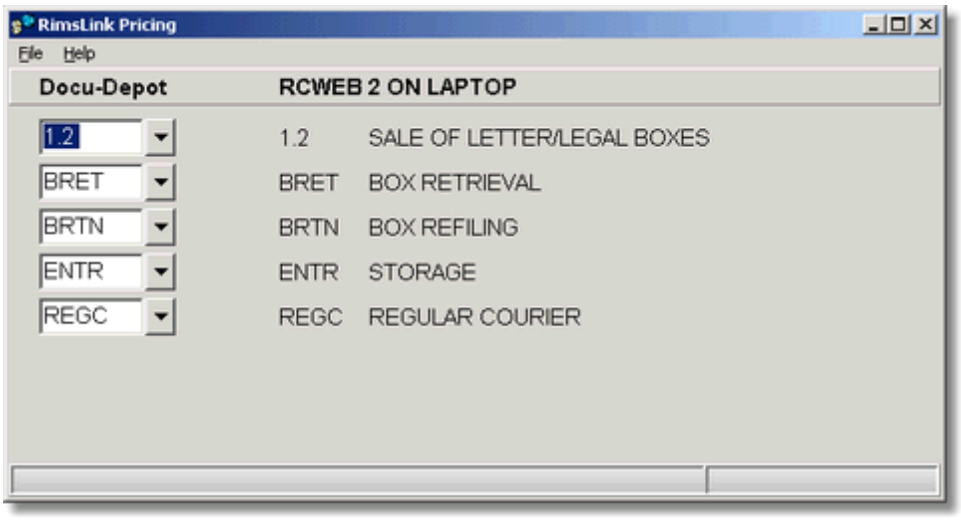

To open pricing for a different record center:
1. From the menu, select **File->Open Service record center**.

Once the correct mapping is open, click the drop-down list to select the price code from those at your record center, and click the **Okay** button to accept the change.

Note: RimsLink pricing consults the invoices at the *Service* record center. If the list of price codes to map is empty, verify that your partner record center has at least one invoice created for at least one of your shared customers.

7 Appendix

Enter topic text here.

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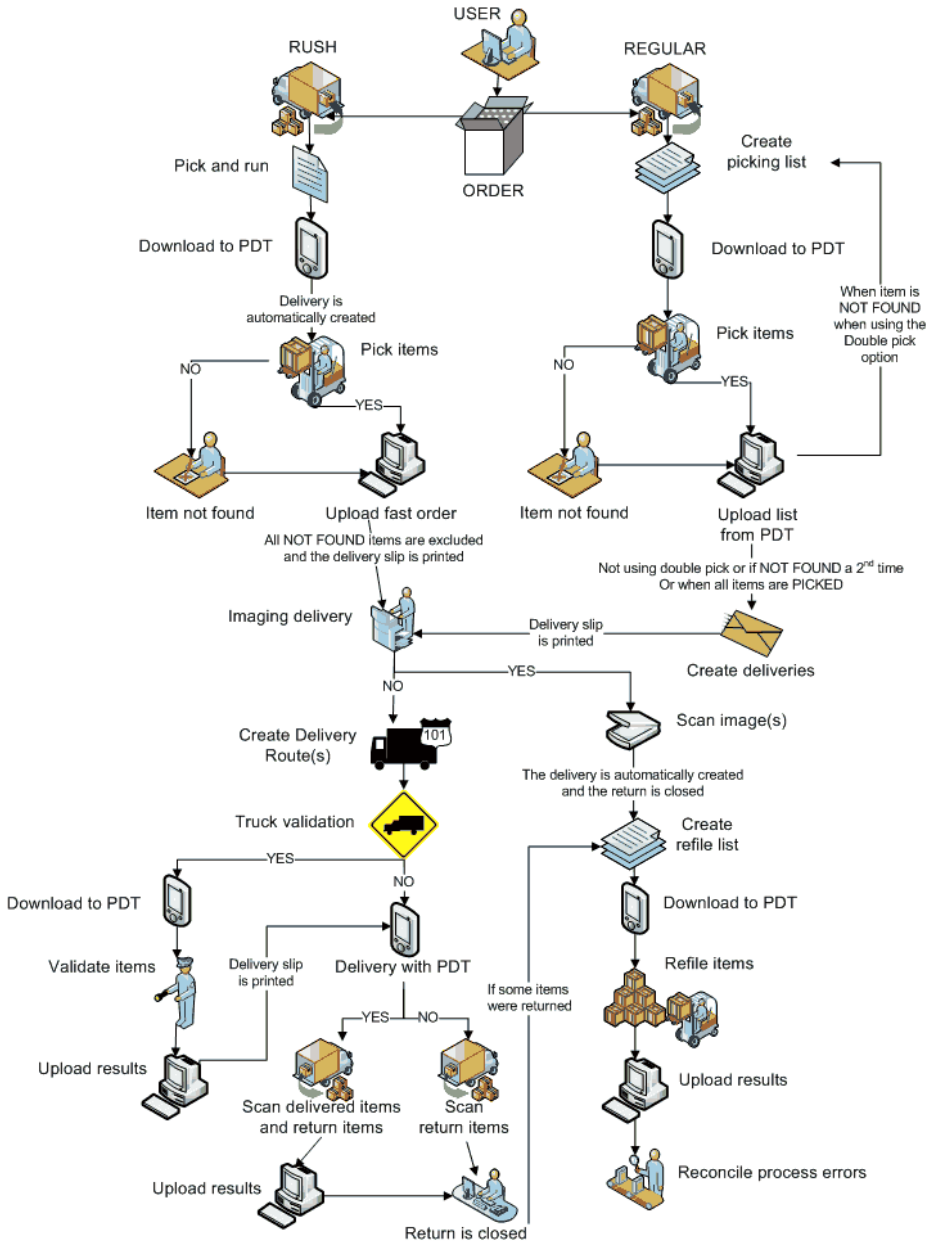
7.1 Workflow of outgoing and incoming items (PDT only)



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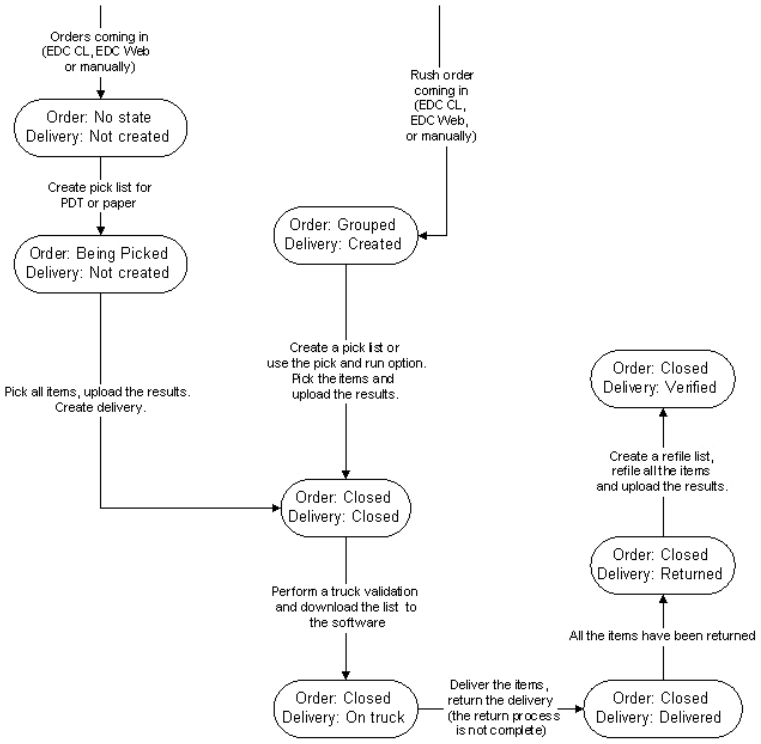
7.2 Delivery and order statuses


Orders coming in (EDC CL, EDC Web or manually)
Order: No state Delivery: Not created
Create pick list for PDT or paper
Order: Being Picked Delivery: Not created
Pick all items, upload the results. Create delivery.
Rush order coming in (EDC CL, EDC Web, or manually)
Order: Grouped Delivery: Created
Create a pick list or use the pick and run option. Pick the items and upload the results.
Order: Closed Delivery: Closed
Perform a truck validation and download the list to the software
Order: Closed Delivery: On truck
Deliver the items, return the delivery (the return process is not complete)
Order: Closed Delivery: Delivered
All the items have been returned
Order: Closed Delivery: Returned
Create a refile list, refile all the items and upload the results.
Order: Closed Delivery: Verified

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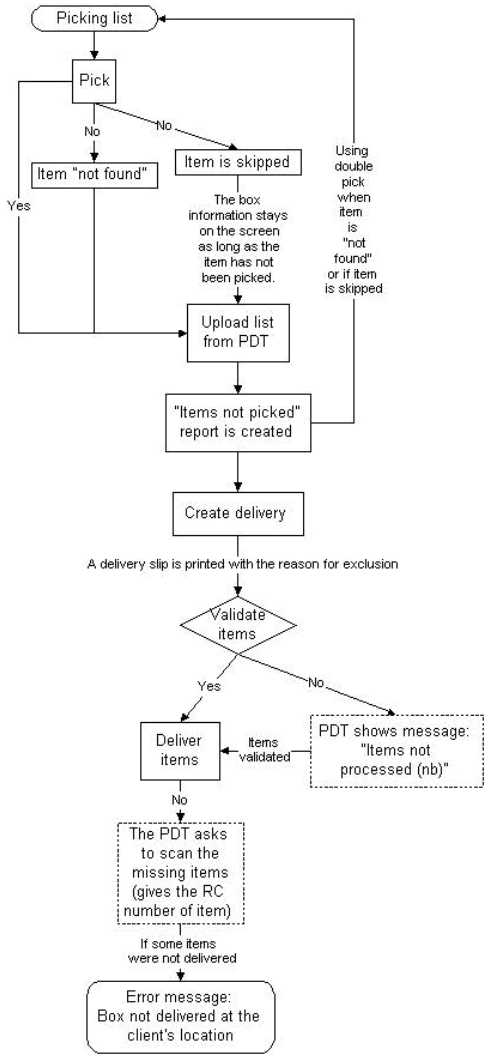
7.3 Integrity verification workflow: Box delivery


Picking list
Pick
No
No
Item "not found"
Item is skipped
Yes
The box information stays on the screen as long as the item has not been picked.
Using double pick when item is "not found" or if item is skipped
Upload list from PDT
"Items not picked" report is created
Create delivery
A delivery slip is printed with the reason for exclusion
Validate items
Yes
No
Deliver items
Items validated
PDT shows message: "Items not processed (nb)"
No
The PDT asks to scan the missing items (gives the RC number of item)
If some items were not delivered
Error message: Box not delivered at the client's location

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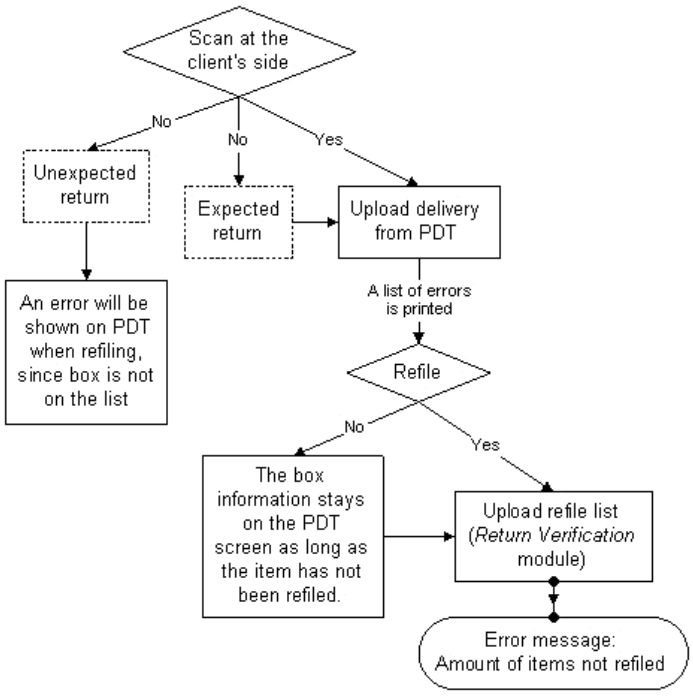
7.4 Integrity verification workflow: Box return


Scan at the client's side
No
No
Yes
Unexpected return
Expected return
Upload delivery from PDT
An error will be shown on PDT when refiling, since box is not on the list
A list of errors is printed
Refile
No
Yes
The box information stays on the PDT screen as long as the item has not been refiled.
Upload refile list (Return Verification module)
Error message: Amount of items not refiled

7.5 Activity codes

*Box/File history

Activity

In	= 1; file or box currently In
Out	= 2; file or box currently Out
Selected	= 3; file or box selected for order entry
Reserved2	= 4; reserved for future usage
PreAdd	= 5; file or box is in Pre Add
OnDispList	= 8; file or box is on a disposal list
OnTransList	= 9; file or box is on a transfer list
OnDelList	= 10; file or box is on a deletion list
Deleted	= 11; box or file deleted (removed from active inventory)
Destroyed	= 12; box of file destroyed (shredded) and removed from active inventory
Transferred	= 13; box or file transferred to other location or company and removed
In_InHouse	= 14; file or box in, at the clients in-house facilities
Out_InHouse	= 15; file or box out, at the clients in-house facilities
Destroyed_InHouse	= 27; file or box destroyed in house
Printed_InHouse	= 32; file label has been pre-printed on client side
Sampled	= 35; box or file Sampled (removed from active inventory)
Revised	= 36; box or file Revised (removed from active inventory)
SentToDepot	= 37; box or file Sent to Depot (removed from active inventory)

(Boxes with activities 1, 2, 3, 8, 9, and 10 are billed for storage.)

**History*

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Moved = 6; file or box was moved
Searched = 7; file or box was searched
DeptChange = 16; department of box or file has changed
NumberChange = 17; box or file number has changed
DescChange = 18; box or file description has changed
TypeChange = 19; box or file type has changed.
AccessLevelChange = 20; box or file access level has changed
DispositionChange = 21; box or file disposition changed (date or disposition type)
VolumeChange = 22; box volume change
BoxChange = 23; cardboard box change. For boxes only
PreAddDeletion = 24; "invisible" history added when a pre add box/file is deleted at a
ImagesScanned = 25; images have been scanned within a file
OnInternalTxList = 26; box is being moved to a new location
VaultTransition = 28; box InVault field has changed
Picked = 29; box or file has been picked
Refiled = 30; box or file has been refiled in the active inventory
UserField6Change = 31; box user field 6 has changed
GeneralChange = 33; some other field changed
ChangeOfHands = 34; When recipient changes at the client site. This history is used to synchronize the change with the record center.
OnInternalTxList = 38; box or file Item set has changed.
Added = 39; First time a box is added at the record center
AltLabelChange = 40;
ExtraFieldChange = 41; (applies to files)
ImagePasswordChange = 55;
ReturnScheduleChange = 56; Change in rotation schedule
ImageIndexChange = 57;
ImagesViewed = 58;
AllImagesDeleted = 59;
NotesChange = 60; { notes have changed. }
KeywordsChange = 61; { keywords have changed }
Imported = 62;

Documents

Editable = 42; { can be checked out for edition }
InEdition = 43; { is checked out for edition }
Finalized = 44; { cannot be modified, for consultation only}

Viewed = 46;
Locked = 47;
VersionAdded = 48;
Unlocked = 49;
Modified = 50; { meta-data modified }
Emailed = 52; { document was extracted for purpose of emailing }
UnFinalized = 53;
Pasted = 54;

In-house items

Printed_InHouse = 32; { file label has been pre-printed on client side }
In_InHouse = 14; { file or box in, at the clients in-house facilities }
Out_InHouse = 15; { file or box out, at the clients in-house facilities }
Destroyed_InHouse = 27; { file or box destroyed in house }

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Electronic = 51; { Physical activity for records that have only an electronic from }
ElectronicAdded = 45;

Destruction type

NonConfidential = 0; destroy document non-confidentially
Permanent = 1; keep the document permanently
Confidential = 2; destroy document confidentially
Sample = 3; take a sample from the document, and destroy the remaining documents in a separate step, either confidentially or not.
Revision = 4; the document must be recalled to the proper authority (ie, a lawyer) before destroying.
SendToDepot = 5; send the document to next depot; an active record goes to an off-site record center, a semi-active record goes to a permanent archiving area.
NullDisposition = 6; the disposition is not determined.

*Delivery

State

Not Processed = 0; neither closed nor returned, grouped
Closed = 1; delivery has been shipped.
Returned = 2; delivery return items have been put on a return
Verified = 3; delivery refiles have been verified.
On truck = 5; truck validated before delivery
Delivered = 4

History

Created = 1
Closed = 2
Returned = 3
Verified = 4
Reopened For Delivery = 5
Reopened For Return = 6
Delivery Type Change = 7
Delivery Address Change = 8
Images Scanned = 9
Delivered = 10
Building Change = 11
Truck Validation = 12

*Order

State

NotProcessed = 0; neither being picked nor closed.
Being Picked = 1; picking list has been created.
Grouped = 2; orders have been grouped into deliveries.
Closed = 3

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Order Item

ItemState

To be picked	= 0
Being picked	= 1; Has been printed or uploaded to a PDT
Picked	= 2; Has been confirmed from a download from a PDT
To be picked again	= 7; When using the double pick option, it will appear in the picking list
Being picked again	= 8; When using the double pick option, has been printed or uploaded to a PDT
Excluded	= 4; Has been excluded when doing the delivery verification
Delivered	= 5; Delivery has been confirmed when using the delivery with PDT option

**ItemType*

Other	= 0
Box	= 1
File	= 2

*Employee statistics

OperationType

Retrieved	= 0
Refiled	= 1

ItemType

When OperationType	= 0
Box	= 0
File	= 1
NonTrack	= 2
Misc	= 3
ShelfFile	= 5
NonPickable	= 6
When OperationType	= 1
BoxReturn	= 1
FileReturn	= 2
Non Track File Return	= 3
BoxAddition	= 4
TrackedIFile	= 5
Surcharge	= 7
Labour	= 8
Non TrackedI File	= 9
Non Track Deletion	= 10
File Addition	= 11
Open Shelf Return	= 12
Open Shelf Addition	= 13

Invoice Item

ItemGroup

Storage	= 1

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Labour	= 2
Courier	= 3
Inventory list	= 4
Imaging	= 5
Open shelf	= 6
Shredding/Recyc	= 7
Supplies	= 8
Miscellaneous	= 100

*Pallet list

State

Authorized - Verified or unprocessed	= 0
Authorized - Being picked	= 1
Authorized - Picked	= 2
Destroyed	= 3

*List

ListType

Destruction	= 0
Transfer	= 1
Disposal list	= 2

Status

Created	= 0
Destroyed	= 1
Locked	= 2
Destroyed	= 3
Authorized	= 4
Destroyed	= 5
Authorized	= 6
Destroyed	= 7

*List Item

Pick State

Unprocessed	= 0
BeingPicked	= 1
Picked	= 2
Verified	= 3

*Delivery Route

State

Created	= 0
On Truck	= 1
On Truck	= 2

*Delivery Type

Courier

Record center	= 0
External	= 1
Fax	= 2
Imaging	= 3

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ShipMode

Regular	= 0
By Date	= 1
By Time	= 2
24 hours	= 3
Half day rush	= 4

*Price

Unit Type

Units	= 0
Minutes	= 1
Cubic feet	= 2
Megabytes	= 3
Linear feet	= 4

*Customer Price

Tax calculation

Tax A only	= 0
Tax B only	= 1
Tax B on tax A	= 2
Not Taxable	= 3

Break

None	= 0
Standard	= 1
Tiered	= 2

*Customer

Billing Type

Regular	= 0
Charge back	= 1
Department	= 2

Courier billing

Container	= 0
Round Trip item	= 1
Delivery	= 2
Item	= 3
By Item type	= 4
Item round trip	= 5

7.6 Importing data

Importing data is useful when transferring data for existing customers from another records management software into EDC RC. (An import wizard[484] exists for adding or updating box and file information.)

Information can be imported to the File, Box, DocumentType, Buildings, BusinessType, Customer and Space tables.

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Given a file containing data, EDC uses a description file to determine which fields to put where.

1* Create a data file 668 (the data can be created in csv, xls, or txt formats)

2* Create a description file 669 (the description file must be done in the txt format)

3* Before importing the entire data, perform a test with a data file containing only one or two boxes| files, etc. and import the data into the software 483.

4* Verify if the information that was imported is correct (one can do this manually or in the Box and File Verification module 446 - this last option is only for boxes and files).

***** steps followed by a star are compulsory

WARNING

This operation ***cannot be undone***. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

7.6.1 Create a data file

Conditions:

- The data file must follow the formatting specified in the table section of the description file it is associated to (see Create a description file 669).
- The data must begin on the first line.
- Each record entry should start on a new line.
- The data file should contain the actual values of the fields later specified in the fields section of the description file.
- The values will be matched to their corresponding fields in the order listed in the description file.

How to create a data file:

1 Determine the Fields in which the information will be imported (ex: Box number, Department, Type, etc.)

2 Enter the different information related to those fields.

If it is a MS Excel file (xls format): separate the various information by column.

If it is a Notepad file (or another software) (txt format): separate the different information with a tab, a comma (or any other character) or separate the different information by column.

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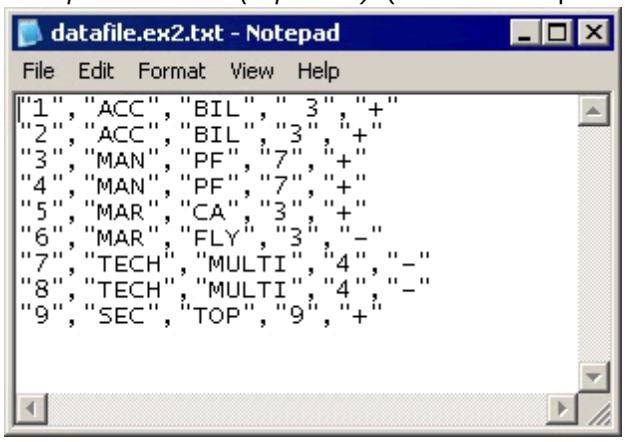
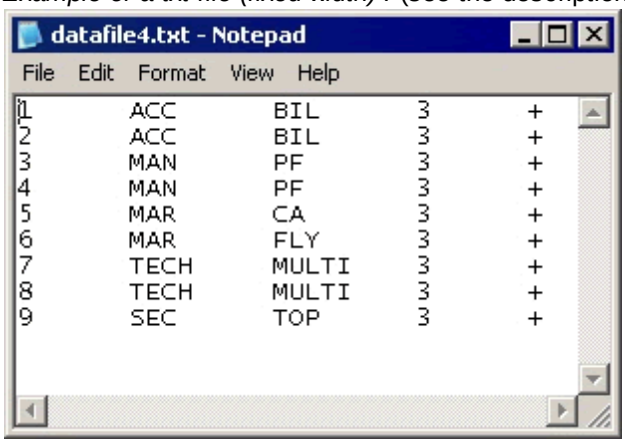
Example of an Excel data file: (see its description file in the Examples 675)

	11	Jean-Marc Girard	ACC	Bills	13/07/2004	BIL	0	13/07/2006	13/07/2004	+	23 Laurier	3	AAA
	22	John Mayer	MAN	Personal files	13/07/2004	PF	2	13/07/2006	13/07/2004	+	23 Laurier	9	BBB
	33	John Lincoln	WEE	Web pages	13/07/2004	MULTI	4	13/07/2006	13/07/2004	-	23 Laurier	4	CCC

Example of a txt file (separated) :(see the description file in the Examples 677)



Example of a txt file (fixed width) : (see the description file in the Examples 678)


datafile4.txt - Notepad
File Edit Format View Help
1 ACC BIL 3 +
2 ACC BIL 3 +
3 MAN PF 3 +
4 MAN PF 3 +
5 MAR CA 3 +
6 MAR FLY 3 +
7 TECH MULTI 3 +
8 TECH MULTI 3 +
9 SEC TOP 3 +

7.6.2 Create a description file

A description file, as explained earlier, is used to pinpoint the location of the information one wants to import. It also pinpoints the final location (in the software) of the imported information. Description files must be in txt format.

Outline:

1. A description file is composed of one or more table descriptions, where each table description begins by *BeginTable* and ends by *EndTable*.
2. One table description consists of a table section and a fields section.
3. Each section is described by keywords, where each keyword is followed by a user-defined or predefined value(s) and operations.
4. The order of the keywords within each section is irrelevant.
5. The keywords are not case sensitive.
6. In the description and data file, all field values are case sensitive.

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Terminology: (see the Examples 675 in the next topic)
Version: The version number of the importation process must be declared before the first **Begin Table**. It is optional and does not affect the import process.

DataFileName: The name of the file containing the data (see Create a data file 668)

FieldsIDType: This specifies how the fields will be identified in the description (**FieldID**) and in the data file. One can choose between:

Column: This is specified when the column numbers are put in the **FieldID**. *This is the only option for fixed width data files*.

Name: This is specified when the names are put in the **FieldID**. When this field is defined, all the field columns must have a name in the data file.

FileType: This specifies the structure or the type of the data file. One can choose between:

Separated: This field applies when some specific character like a tab, a comma or any other character separates the field values in the data file. In this case the separator and a delimiter character must be defined in the description file (see **Separator** and **Delimiter**).

FixedWidth: This field applies when the field values in the data file are grouped in a column that occupies a fixed width. In this case the starting and ending position of each column must be specified for each field (see **ColumnStart** and **ColumnEnd**). For this particular field, the only possible value for **FieldsIDType** is ***Column***. Yet, the ***Column*** numbers do not have to be sequential.

Excel: This field applies when the data file is a MS Excel file. A sheet number must be specified under **SheetNumber** (for the moment the only sheet number supported is the number 1).

Separator: This field is only used when the **FileType** is defined as ***Separated***. It represents the character used to separate the field values in the data file. It is a simple, case sensitive, non-empty character that must be defined when used.

Delimiter: This field is only used when the **FileType** is defined as ***Separated.*** It represents the character to put before a separator, so the separator will be interpreted as a normal character within a string. It is a simple, case sensitive, non-empty character that must be defined when used.

Ex: If the **Separator** is (,) and the **Delimiter** is (") then the expression "First,field","Second, Field" is interpreted as two fields, not four.

SheetNumber: This field is only used when the **FileType** is defined as ***Excel***. It specifies the sheet number of the table's data (for the moment the only sheet number supported is the number 1).

TableName: This specifies the name of the table from which the information will be imported into EDC RC. Table names are case sensitive. Only data from the following tables can be imported: File, Box, DocumentType, Buildings, BusinessType, Customer.

DefaultEDCFieldValue: Specifies a default field value, which will be inserted in every record of the specified table. This operation can be repeated more than once in the Table Section but cannot be duplicated.

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*Table key fields cannot be given default values.

This field must be followed by: <EDC field name>(<default value>,<mask>)
<EDC field name> specifies a specific EDC field name of the current table.

If the default value is a date or time then a comma and a mask must follow it. If a comma is part of the default value or mask, use another comma as delimiter.

Ex:
DefaultEDCFieldValue StartDate(2003/12/13,yyyy/mm/dd)
DefaultEDCFieldValue StartDate(2003,,12,,13,yyyy,,mm,,dd)

BeginField: This delimits the beginning of a field description; a field description must be done for every table field (ex: one for MainDeptName, one for CustBoxNo, etc.)

ColumnStart: This is used when the **FileType** is ***FixedWidth***. It represents the starting horizontal position of the field value in the data file (the minimum value is 1).

FieldID: This specifies the table's field to be described. This can be the field's column number or a name found in the data file (see **FieldsIDType**). The field name is case sensitive and the minimum column number is 1.

EDCFieldName: This is the name of the EDC field to which the currently described field corresponds. It must be a valid EDC field name and is thus case sensitive (it cannot have been declared as default before, because if more than one table field is mapped to the same EDC field name, their values will all be concatenated (linked) after the conversions have been done).
**If an EDC field name is not written properly, the software will not recognize it and will not import the related data (an error message will not appear either.)* See the EDC Field Names 679 section of the chapter.

FieldType: This specifies the type of the field as it is in the data file; it should match the actual field type in EDC RC as well. One can choose between:

Number: This applies when the possible values are numbers

Alpha: This applies when the possible values are alphanumerical strings.

Date: This applies when the possible values are dates, in this case a date mask must be specified (see **DateMask**.)

Time: This applies when the possible values are times, in this case a time mask must be specified (see **TimeMask**.)

Boolean: This applies when the possible values are true or false (yes or no) ; in this case the values written in the data file must be (+) or (-) .

DateMask: This specifies the structure of the ***Date*** in **FieldType**. If a year is represented by two digits then an epoch must also be specified (see **Epoch**.)

Ex: yyyy/mm/dd

Epoch: This specifies a two digit integer used to determine a date prefix, so that all two digits dates below the epoch value will be assigned a prefix 20, and all two digit dates above the epoch

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value will be assigned a prefix 19.

Ex: If the Epoch is set to 80 and the Date is set to 04/05/05, then the software will put 2004/05/05 for the date when doing the importation.

Note: Specifying an epoch is optional if the imported dates have 4-digit years.

TimeMask: This specifies the structure of the ***Time*** in **FieldType**.

Ex: hh/mm/ss

ConversionType<(value1,value2)>
This specifies how the current field's value should be modified (if needed). Many conversions can be performed on a single field value. The conversion can be placed anywhere between 'BeginField' and 'EndField' in the description file. When 2 values are needed, a comma must separate them. When a comma is part of a value, one should delimit it with another comma.
Ex: Conversion Replace(old,,String,new,,String) will replace string 'old,String' with 'new,String'

Here are the various possibilities:

Conversion PadLeft(Length, Char): The field's value will be padded to the left with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Ex: If a field's value is '6', after PadLeft(4, 0), it will be '0006'

Conversion PadRight(Length, Char): Similar to PadLeft, but the padding is added to the right.

Ex: If a field's value is '6', after PadRight(4, 0), it will be '6000'

Conversion Uppercase: The field's value will be converted to upper case letters.

Ex: If a field's value is 'Hello!', after Uppercase, it will become 'HELLO!'

Conversion Lowercase: The field's value will be converted to lower case letters.

Ex: If a field's value is 'Hello!', after Lowercase, it will become 'hello!'

Conversion AddPrefix(prefix): The field's value will be prefixed using the value of 'prefix'.

Ex: If a field's value is 'Smith', after AddPrefix(Dr.), it will become 'Dr. Smith'

Conversion AddSuffix(suffix): The field's value will be suffixed using the value of 'suffix'

Ex: If a field's value is 'Dr. Smith', after AddSuffix(Jr.), it becomes 'Dr. Smith Jr.'

Conversion Delete(from,count): The 'count' characters will be deleted from the field's value starting from position 'from' where the first character is considered at position 1.

Ex: If a field's value is 'IceCreamEater', after Delete(4,5), it becomes 'IceEater'.

Conversion RemoveRightMost(count):The 'count' characters will be deleted from the right side of the field's value.

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Ex: If a field's value is 'Hi there', after RemoveRightMost(6), it becomes 'Hi'

Conversion Insert(position,string): The value of 'string' will be inserted in the field's value before the position indicated by 'position', (the first character is considered at position 1.)

Ex: If a field's name is 'Fruits juice', after Insert(7,& Cream), it becomes 'Fruits & Cream juice'

Conversion Replace(OldValue,NewValue): If the field's value is 'OldValue' it will be replaced by the value of 'NewValue'. If one of the field values contains a comma (,) character, then it needs to be enclosed in brackets ("").

Ex: If the field's value is 'IN', after Replace(IN, Received), it becomes 'Received'

EndField: This specifies the end of a field description.

Constraints:

1 The table section must be specified once for each table.
2 There must be one field description per actual table field.
3 All words (keywords and values) located on the same line must be separated by one space character (ASCII #32).
4 All keywords must start on a new line.
5 If a certain keyword is not applicable then it can be omitted from the description file.
6 Every line can be preceded or followed by empty lines
7 Empty table fields will be given an EDC default value.
8 A record will be skipped if required table fields have empty values.
9 A line that starts with // is a comment and will be ignored
10 A line that starts with { will be followed by a comment that will end on a line that ends with }

Table specific rules:

Box Table

- Possible values for Activity field at the record center: PreAdd, In, Out. If the activity is In, a valid location must be specified. If the value is PreAdd or Out, any location is ignored.

- Possible values for Activity field at the client: PreAdd, Printed (in-house). If the activity is not valid, it will default to PreAdd at both the record center and client sites.

- Possible values for DestType field: NonConfidential, Permanent, Confidential, Sample, Revision, SendToDepot, None

- Alternate bar code labels may be imported with a field name of 'BarCode'. Both primary and secondary notes may be imported with field names called 'Notes1' and 'Notes2' respectively.

- With the box table import it is possible to update existing records . If a matching box based on CustBoxNo or on BoxDDNo is found, the box will be updated.

- When importing boxes into the IN state, the location in which the boxes will be imported must be a transit location.

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- Certain values are obligatory when importing: Activity, MainDeptName, SubDeptName, Volume, CustBoxNo.

File Table

- Possible values for Activity field at the record center: PreAdd, Out

- Possible values for Activity field at the client: PreAdd, Printed (in-house). If the activity is not valid, it will default to actPreAdd at both the record center and client sites.

- Possible values for DestType field: NonConfidential, Permanent, Confidential, Sample, Revision, SendToDepot, None

- Alternate bar code labels may be imported with a field name of 'BarCode'. Both primary and secondary notes may be imported with field names called 'Notes1' and 'Notes2' respectively.

- With the file table import it is not possible to update existing records, as there is no unique key in the file table, ie, it is possible to have duplicate CustFileNo and Description values, if the option "Unique File number" is set to "No" in the Customer Information module.

Import Options

The following options affect which types of operations are allowed by the import, and what messages appear in the import log. They are designed to protect against some of the dangers of importing data rather than

***boxmodifyonly:** Allows existing boxes in the system to be updated, but prevents the addition of new records for boxes that are not recognized.
***filemodifyonly:** Allows existing files in the system to be updated, but prevents the addition of new records for files that are not recognized.
***departementmodifiyonly:** Prevents the addition of new departments.
***donotupdateexistingrecords:** Allows the addition of new records but prevents existing boxes in the system from being modified.
***skipduplicaterecordwarning:** Omits the warning that would otherwise appear in the import error log when a record is affected twice by the same import.
***skiptruncationwarning:** Omits the warning that would otherwise appear in the import error log when the length of a data string exceeds the length available in the field in the system.
***skipfileboxintegrity:** Omits the warning that would otherwise appear in the import error log when a file has different retention than the box containing it.
***disablestartenddatewarning:** Omits the warning that would otherwise appear in the import error log when the end date for a record is more recent than the start date.
***disablerangewarning:** Omits the warning that would otherwise appear in the import error log when the start of a range is greater than the end of a range.
***allowstatechange:** Allows the import to affect the state of the box, for example between PRE ADD, IN, and OUT.
***RejectOnDuplicateAltLabel:** Causes an attempt to import a record with an alternate label that already exists in the system to reject the update or addition of the new box rather than adding the box (without the alternate label) but including an error message and skipping the assignment of the barcode.
***SkipVaultValidation:** With this option, it is possible to import items for tape-only accounts into non-vault locations.
***ReplaceNotesInsteadOfAppend:** Causes notes fields to be overwritten by the import rather than appending imported notes to the existing notes for the box or file.

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7.6.2.1 Examples of description files

**Example of a description file for a box importation (Excel data file): (this example refers to the previously seen excel data file)*

```
Version        1

BeginTable

// fields are identified by column number
FieldsIDType    column

// command separated file
FileType        excel
SheetNumber     1
Tablename       Box
DataFileName  U:\data\Import tests for manual\datafile.box.xls
* skiptruncationwarning

DefaultEDCFieldValue CustKey(F-001)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
FieldID       2
EDCFieldName CustBoxNo
FieldType     alpha
EndField

BeginField
FieldID       3
EDCFieldName BoxOwner
FieldType     alpha
EndField

BeginField
FieldID       4
EDCFieldName MainDeptName
FieldType     alpha
EndField

BeginField
FieldID       5
EDCFieldName Description
FieldType     alpha
EndField

BeginField
FieldID       6
EDCFieldName StartDate
FieldType     date
DateMask    dd/mm/yyyy
```

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```
Epoch       80
EndField

BeginField
FieldID     7
EDCFieldName DocType
FieldType   alpha
EndField

BeginField
FieldID     8
EDCFieldName DestType
FieldType  number
EndField

BeginField
FieldID     9
EDCFieldName DestDate
FieldType   date
DateMask   dd/mm/yyyy
Epoch       80
EndField

BeginField
FieldID     10
EDCFieldName EntryDate
FieldType   date
DateMask   dd/mm/yyyy
Epoch       80
EndField

BeginField
FieldID     11
EDCFieldName  InVault
FieldType   boolean
EndField

BeginField
FieldID     12
EDCFieldName SourceLoc
FieldType   alpha
EndField

BeginField
FieldID     13
EDCFieldName AccessLevel
FieldType   number
EndField

BeginField
FieldID     14
EDCFieldName OldCustBoxNo
FieldType   alpha
```

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```
EndField

EndTable
```

**Example of a description file for a box importation (using Separated FileType):*

```
BeginTable

FileType        separated
DataFileName    U:\datatestsmanual\datafile.ex2.txt
Separator       ,
Delimiter       "
FieldsIDType    Column
TableName       Box

DefaultEDCFieldValue CustKey(DEMO-E)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
FieldID         1
EDCFieldName CustBoxNo
FieldType       alpha
Conversion      AddPrefix(DATA-00)
EndField

BeginField
FieldID         2
EDCFieldName MainDeptName
FieldType       alpha
EndField

BeginField
FieldID         3
EDCFieldName DocType
FieldType       alpha
EndField

BeginField
FieldID         4
EDCFieldName Accesslevel
FieldType       number
EndField

BeginField
FieldID         5
EDCFieldName InVault
FieldType       boolean
EndField

EndTable
```

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**Example of a description file for a box importation (using FixedWidth FileType):*
BeginTable

```
FileType        FixedWidth
DataFileName    U:\datatestsmanual\datafile4.txt
FieldsIDType            Column
TableName       Box

DefaultEDCFieldValue CustKey(DEMO-E)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
ColumnStart             1
ColumnEnd               7
FieldID     1
EDCFieldName CustBoxNo
FieldType     alpha
Conversion    AddPrefix(DATA2-00)
EndField

BeginField
ColumnStart             8
ColumnEnd               16
FieldID     2
EDCFieldName MainDeptName
FieldType     alpha
EndField

BeginField
ColumnStart             17
ColumnEnd               25
FieldID     3
EDCFieldName DocType
FieldType     alpha
EndField

BeginField
ColumnStart             26
ColumnEnd               32
FieldID     4
EDCFieldName Accesslevel
FieldType     number
EndField

BeginField
ColumnStart             33
ColumnEnd               36
FieldID     5
EDCFieldName InVault
```

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FieldType boolean
EndField

EndTable

7.6.2.2 List of EDC Field Names

Here is a list of EDC Field Names in order to be able to do the importation.
The following abbreviations are used for the various types of data:

(A) Alphanumerical field, meaning characters such as letters and numbers.
(N) Numerical
(D) Date. When using this type of field, the DateMask and Epoch must be specified in the description file.
(T) Time. You must specify the T (you must specify the **TimeMask** in the description file
(B) Boolean FieldType (the values must be + or -)

General

Customer key - CustKey

Boxes

TableName: Box

Number - CustBoxNo (A)
Owner - BoxOwner (A)
Department (it is preferable to define or import it in EDC RC prior to this importation) - MainDeptName (A)
Sub department (it is preferable to define or import it in EDC RC prior to this importation) - SubDeptName (A)
Alternate label (this field is only visible when an alternate label is assigned to the item) - BarCode (A)
Description - Description (A). Note that when importing to this field, CrLf, Cr, Lf, and Tab characters are replaced with spaces.
Start Date - StartDate (D)
Type - (it is preferable to define or import it in EDC RC prior to this importation) DocType (A)
Field1- UserField1 (A)
Field3- UserField3 (A)
Disposal : DestType (N) *see the activity codes for destruction types below DestDate (D)
Range : RangeFrom (A) RangeTo (A)
Files – *not possible*
Entry Date - EntryDate (D)
Volume – Volume (N)
In vault – InVault (B)
Field4- UserField4 (A)
Field6- UserField6 (B)
State - Activity (A)
Box out to - OutTo (A) This will be used in the box history for boxes that have the Out state at the time of import.
Out Date - OutDate (D) Date that the item went out.
Box RC number – BoxDDNo (***this is only done in order to update the CustBoxNo or other fields - this means that an initial importation has to be performed before.)
End Date – EndDate (D)
Source – SourceLoc (A)

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Field2 – UserField2 (A)
Access level - Accesslevel (N)
Old box number – OldCustBoxNo (A)
Withdrawal Date – * one should not include this field in the importation since it is specified when a box is added to a deletion list.
Location - Location (A) (* make sure it respects the location mask 202 predefined in EDC RC)
Field5 – UserField5 (A)
Item set – *not possible*

Notes1- The information will be imported in the Notes of the box (A)
Notes2 - The information will be imported in the Secondary Notes of the box (A)
BarCode - The information will be imported as the alternate label of the box (A)

Files

TableName: Folder

Customer key – CustKey (A)
Number – CustFileNo (A)
Owner – FileOwner (A)
Department (it is preferable to define or import it in EDC RC prior to this importation) - MainDeptName (A)
Sub department (it is preferable to define or import it in EDC RC prior to this importation) - SubDeptNo (A)
Alternate label (this field is only visible when an alternate label is assigned to the item) - BarCode (A)
Description - Description (A) Note that when importing to this field, CrLf, Cr, Lf, and Tab characters are replaced with spaces.
Start Date - StartDate (D)
Type - (it is preferable to define or import it in EDC RC prior to this importation) DocType (A)
Field1- UserField1(A)
Field3- UserField3 (A)
Disposal - DestType (N)*see the activity codes for destruction types below DestDate (D)
Range - RangeFrom (A) RangeTo (A)
Box – CustBoxNo (A)
Entry Date – EntryDate (D)
State – Activity (A)
File out to - OutTo (A) This will be used in the file history for files that have the Out state at the time of import.
Out Date - OutDate (D) Date that the item went out.
File RC number – FileDDNo (***This is only done in order to update the CustFileNo or other fields - this means that an initial importation has to be performed before. The problem is that updating a CustFileNo may create a duplicate file number, so it is very important to verify all the data before importing.)
End Date – EndDate (D)
Source – SourceLoc (A)
Field2 – UserField2 (A)
Access level - Accesslevel (N)
Old number – OldCustFileNo (N)
Withdrawal Date – WithdrawalDate (D)* one should not include this field in the importation since it is specified when a file is added to a deletion list.
Item set – *not possible*

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*Notes1 - The information will be imported in the Notes of the file (A)
Notes2 - The information will be imported in the Secondary Notes of the file (A)
BarCode - The information will be imported as the alternate label of the file (A)

Field 40_1 - Field40No1 (A)
Field 40_2 - Field40No2 (A)
Field 40_3 - Field40No3 (A)
Field 40_4 - Field40No3 (A)
Field 40_5 - Field40No4 (A)

Field 60_1 - Field60No1 (A)
Field 60_2 - Field60No2 (A)
Field 60_3 - Field60No3 (A)
Field 60_4 - Field60No4 (A)
Field 60_5 - Field60No5 (A)

Field 80_1 - Field80No1 (A)
Field 80_2 - Field80No2 (A)
Field 80_3 - Field80No3 (A)
Field 80_4 - Field80No4 (A)
Field 80_5 - Field80No5 (A)

Retention Schedule (Document type)
TableName: Cust Document Type

Type – Code (A)
French description - FrenchDesc (A)
English description – EnglishDesc (A)

Retention
Active – ActiveRet (N)
Semi-active – SemiActiveRet (N)

Disposal
Active – ActiveDisposal (N)
Semi-active - SemiActiveDisposal (N)

*Activity codes for destruction types

Confidential	= 2; { destroy document confidentially }
NonConfidential	= 0; { destroy document non-confidentially}
NullDisposition	= 6; { the disposition is not determined.}
Permanent	= 1; { keep the document permanently }
Revision	= 4; { the document must be recalled to the proper authority (ie, a lawyer) before destroying. }
Sample	= 3; { take a sample from the document, and destroy the remaining documents in a separate step, either confidentially or not. }
SendToDepot	= 5; { send the document to next depot; an active record goes to an off-site record center, a semi-active record goes to a

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permanent archiving area.}
Active – Active (B)
Restrictions – *not possible*
Legal Evaluation – LegalEval (A)
Financial Evaluation – FinancialEval (A)

Buildings
TableName: Buildings

Building – BuildingStr (A)
Description – Description (A)
Transit locations – *not possible*
Multiple transit locations – MultiTransitLocation (B)
Statistic threshold – StatThresholdMins (N)
Address – AddrLine1 (A)
AddrLine2 (A)
City – City (A)
Province – State (A)
Postal code – PostalCode (A)
Country – Country (A)

Name – ContactName (A)
Telephone – ContactPhone (A) ContactExt (A)
Fax – ContactFax ((A)
Associated buildings – *not possible*

Business type
TableName: Business Type

Code – Code (A)
Description - Description (A)

Customer Information
TableName: Customer

General
Name – Name (A)
Customer key – CustKey (A)
Accounting key – AccountingKey (A)
System – *not possible*
Creation Date – CreationDate (D)
Active – Active (B)
Locked – Locked (B)
Salesperson – Salesperson (A)
Delivery types – *not possible*
Box types– *not possible*
Ordering notes – OrderNotes(A)

Address
Address – AddrLine1 (A)
AddrLine2 (A)
City - City (A)
Province – State (A)

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Postal code – PostalCode (A)
Country – Country (A)
Telephone – Phone (A) Ext (A)
Fax – Fax (A)
Email – Email (A)

Billing
Bill to – BillTo (A)
Email – AccountingEmail (A)
Auto Invoice – AutoInvoice (B)
Net days – InvoiceNetDays (N)
Default Charge Code – DefaultChargeCode (A)
Billing – BillingType (N) (0: Regular, 1: Charge back, 2: Department)
Invoice Start Month – InvoiceStartMonth (N)
Invoices/year – InvoicesPerYear (N)
Min Cost/Month – MinimumCostPerMonth (N)
Separate Rent Invoice – SeparateRentInvoice (B)
Rent Inv. Start Month – RentInvoiceStartMth (N)
Rent Invoice / year - RentInvoicesPerYear (N)
Page brk detailed Inv. – PageBreakDetailedInv (B)
Billing Building – BillingBuilding (A)
Business – BusinessType (A)
Taxable – Taxable (B)
Purchase Order – InvPurchaseOrder
Renewal Date – RenewalDate (D)
Charge Rent – ChargeRentArrears (B)
Rent Calculation – RentCalculation (A)
Rent Credit – NoRentCredit (B)
Bill full month add/del – BillFullMonthNewBox (B)
Courier Billing – CourierBilling (N) (0: Container, 1: Round Trip item, 2: Delivery, 3: Item, 4: By Item type, 5: Item round trip)
Hourly Rate – HourlyRate (N)
Dictionary string not found – *not possible*
Dictionary string not found – *not possible*
Invoice format – NotPaperInvoice (B)*
PDFInvoice (B) TIFInvoice (B)

Options
Delivery Time – DeliveryTime (0: AM, 1:PM, 2: Both)(N)
Pick Up Time – PickUpTime (0: AM, 1:PM, 2: Both) (N)
Retention – RetentionType (1: Document, 0: Department) (N)
Language – Language (0: English, 1: French) (N)
Types by department – TypeBySubDept (B)
Non track warning – NonTrackWarning (B)
Range Mask – RangeMask (A)
Delivery Labels – DeliveryLabels (B)
Force Passwords – ForcePasswords (B)
Type Integrity – TypeIntegrity (B)
Restriction Integrity – RestrictionIntegrity (B)
Department integrity – DeptIntegrity (B)
Disposal date integrity –DispDateIntegrity (B)
Return To – ReturnTo (A)
Location mask – LocationMask (A)

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Default Box Volume – DefaultBoxVolume (N)
Replication – Replication (B)
Volume equivalence box – VEBoxSize1 (N)
= Location – VELocationSize1 (N)
Auto Inventory File – AutoInventoryFile (B)
Order Pre Add Files – OrderPreAddFiles (B)
File To Box Conversion – FileToBoxConversion (B)
File out cards – SuppressFileOutCards (B)
Open Shelf Out Cards - OpenShelfOutCards (B)
File to search conversion – FileToSrchConversion (B)
Sealed Box- SealedBox (B)
Limit to one building – LimitToBuilding (B)
Building – Building (A)
Has Split – *not possible*
Unique File Number – UniqueCustFileNo (B)
Time with by date order – TimeWithByDateOrder (B)
Order Grouping – NoOrderGrouping (B)
Tape Number Change – TapeNumberChange (B)
Immediate Delivery – ImmediateDelivery (B)
Default box number length – BoxNumberWidth (N)
Automatic box number – AutoBoxNumber (B)
Default file number length – FileNumberWidth (N)
Automatic file number – AutoFileNumber (B)
File in box tracking – NoFileInBoxTracking (B)*
Use ID Cards – IDCardUsage (B)
PDT Number Change – PDTNumberChange (B)
Delivery with PDT – DeliveryWithPDT (B)
Verify Items Not Found – VerifyItemsNotFound (B)
Truck Validation – TruckValidation (B)
EDC Web Department Filtering – WebDeptFiltering (B)
Full Text Search – FullTextSearch (B)
Use Expected Return Dates – ExpectedReturnDates (B)
Recycle after destruction – ReuseBoxesAfterDest (B)

Accession
Department – *not possible*
Document type – *not possible*

Pick up
Morning picking time – MorningPickingTime (must be written hh/mm - ex: 09:00) (T)
Afternoon Picking Time – AfternoonPickingTime (must be written hh/mm - ex: 14:00) (T)

Bill –
ContactName0 (A)
ContactPhone0 (A)
ContactExt0 (A)
ContactFax0 (A)

Purchase –
ContactName1 (A)
ContactPhone1 (A)
ContactExt1 (A)
ContactFax1 (A)

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Contract–
ContactName2 (A)
ContactPhone2 (A)
ContactExt2 (A)
ContactFax2 (A)

Other–
ContactName3 (A)
ContactPhone3 (A)
ContactExt3 (A)
ContactFax3 (A)

Invoices
Print Detailed Invoice – PrintDetailedInvoice (B)
Print Delivery Summary – PrintDeliverySummary (B)
Print Out Boxes – PrintOutBoxes (B)
Print Activity Report – PrintActivityReport (B)

Fast Orders
Recipient – FastOrderRecipient (A)
Delivery type – *not possible*
Delivery address – *not possible*

Schedule
Override default schedule – ScheduleOverride (B)
Deliver during record center holidays – *not possible*

Sunday –
OpenW_Sunday (B)
WStartTime_Sunday(T)
WEndTime_Sunday(T)

Monday –
OpenW_Monday (B)
WStartTime_Monday (T)
WEndTime_Monday(T)

Tuesday –
OpenW_Tuesday (B)
WStartTime_Tuesday (T)
WEndTime_Tuesday(T)

Wednesday –
OpenW_Wednesday (B)
WStartTime_Wednesday (T)
WEndTime_Wednesday(T)

Thursday –
OpenW_Thursday (B)
WStartTime_Thursday (T)
WEndTime_Thursday(T)

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Friday –
OpenW_Friday (B)
WStartTime_Friday (T)
WEndTime_Friday(T)

Saturday –
OpenW_Saturday (B)
WStartTime_Saturday (T)
WEndTime_Saturday(T)

** All the start and end times must be written hh/mm - ex: 09:00 or 17:00

Location

Since the auto creation of locations does not allow us to specify all the settings (ex: holding locations). The import is an alternate way of performing a batch creation of locations.

TableName: Space

*Location - Location (A)
Alternate Label - AlternateLabel (A)
Total Size - *not possible*
*Unit Size - UnitSize (N)
All Sizes - AcceptAllSizes (B)
*Capacity - Capacity (N)
Vault - Vault (B)
Holding - Holding (B)
Tape - Tape (B)
Customer / All - *not possible*
Department - *not possible*
Price code - PriceCode (A)
Used - Used (N)
In - InUnits (N)
Out - OutUnits (N)

General pricing

TableName: Price

UnitType (A) (Each/Minutes,CubicFeet,MegaBytes,LinearFeet,Delivery)
TaxCalculation (A) (TaxAOnly, TaxAPlusTaxB, TaxBOnTaxA, NotTaxable, TaxBOnly)
PriceCode (A)
FrenchDesc (A)
EnglishDesc (A)
Rate (N)
ItemGroup (A) (Rent, Labour, Courier, InventoryList, Imaging, OpenShelf, Misc)

Customer pricing

TableName: Customer Price

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UnitType (A) (Each/Minutes/CubicFeet/MegaBytes/LinearFeet/Delivery)
TaxCalculation (A) (TaxAOnly, TaxAPlusTaxB, TaxBOnTaxA, NotTaxable, TaxBOnly)
CustKey (A)
PriceCode (A)
Rate (N)

7.6.3 Other examples of data and description files

These are a few examples of data and description files, take note that all the fields are not necessarily included in the examples.

Excel data file for the File importation:

100	Jean-Marc Girard	ACC	GEN	FILE 1	13/07/2004	BIL	2001	0	13/07/2006	1	9	11	13/07/2004		23 Laurier	3	AA	13/07/2006
101	Jean-Marc Girard	ACC	GEN	FILE 2	13/07/2004	BIL	2002	0	13/07/2006	10	19	11	13/07/2004		23 Laurier	3	AB	13/07/2006
102	John Mayer	MAN	GEN	FILE 3	13/07/2004	PF	2001	2	13/07/2006	1	9	22	13/07/2004		23 Laurier	9	AC	13/07/2006
103	John Mayer	MAN	GEN	FILE 4	13/07/2004	PF	2002	2	13/07/2006	10	19	22	13/07/2004		23 Laurier	9	AD	13/07/2006
104	John Mayer	MAN	GEN	FILE 5	13/07/2004	PF	2003	2	13/07/2006	20	29	22	13/07/2004		23 Laurier	9	AE	13/07/2006
105	John Mayer	MAN	GEN	FILE 6	13/07/2004	PF	2004	2	13/07/2006	30	39	22	13/07/2004		23 Laurier	9	AF	13/07/2006
106	John Mayer	MAN	GEN	FILE 7	13/07/2004	PF	2005	2	13/07/2006	40	49	22	13/07/2004		23 Laurier	9	AG	13/07/2006
107	John Lincoln	WEB	GEN	FILE 8	13/07/2004	MULTI	2001	4	13/07/2006	50	59	33	13/07/2004		23 Laurier	4	AH	13/07/2006
108	John Lincoln	WEB	GEN	FILE 9	13/07/2004	MULTI	2002	4	13/07/2006	60	69	33	13/07/2004		23 Laurier	4	AI	13/07/2006
109	John Lincoln	WEB	GEN	FILE 10	13/07/2004	MULTI	2003	4	13/07/2006	70	79	33	13/07/2004		23 Laurier	4	AJ	13/07/2006
110	John Lincoln	WEB	GEN	FILE 11	13/07/2004	MULTI	2004	4	13/07/2006	80	89	33	13/07/2004		23 Laurier	4	AK	13/07/2006

Description file for the File importation:
BeginTable

// fields are identified by the column number
FieldsIDType column

FileType excel
SheetNumber 1
Tablename File
DataFileName U:\data\Import tests for manual\datafile.files.xls

DefaultEDCFieldValue CustKey(F-001)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(PreAdd)

BeginField
FieldID 1
EDCFieldName CustFileNo
FieldType alpha
EndField

BeginField
FieldID 2
EDCFieldName FileOwner
FieldType alpha
EndField

BeginField
FieldID 3
EDCFieldName MainDeptName

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```
FieldType    alpha
EndField

FieldID      5
EDCFieldName Description
FieldType    alpha
EndField

FieldID      6
EDCFieldName  StartDate
FieldType    date
DateMask   dd/mm/yyyy
Epoch        80
EndField

BeginField
FieldID      7
EDCFieldName  DocType
FieldType    alpha
EndField

FieldID      8
EDCFieldName UserField1
FieldType    alpha
EndField

BeginField
FieldID      9
EDCFieldName DestType
FieldType    number
EndField

BeginField
FieldID      10
EDCFieldName DestDate
FieldType    date
DateMask   dd/mm/yyyy
Epoch        80
EndField

BeginField
FieldID      11
EDCFieldName RangeFrom
FieldType    alpha
EndField

BeginField
FieldID      12
EDCFieldName RangeTo
FieldType    alpha
EndField

FieldID      13
```

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EDCFieldName CustBoxNo
FieldType alpha
EndField

BeginField
FieldID 14
EDCFieldName EntryDate
FieldType date
DateMask dd/mm/yyyy
Epoch 80
EndField

BeginField
FieldID 16
EDCFieldName SourceLoc
FieldType alpha
EndField

BeginField
FieldID 17
EDCFieldName Accesslevel
FieldType number
EndField

BeginField
FieldID 18
EDCFieldName OldCustFileNo
FieldType alpha
EndField

EndField

EndTable

Excel data file for the Retention schedule (document type) importation:

TA	TAPE	12	12	4	5			+
BIL	BILLS	24	12	6	1	BIL	BIL	-
CA	CARDS	5	6	3	3			-
FLY	FLYERS	5	6	2	4			-
DOC	DOCUMENTS	24	12	0	2	DOC	DOCU	-

Description file for the Retention schedule (document type)importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\datafile.ret.sc.xls
FieldsIDType Column
TableName Cust Document Type
DefaultEDCFieldValue CustKey(DEMO-A)

BeginField
FieldID 1
EDCFieldName Code

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```
FieldType    alpha
EndField

BeginField
FieldID      2
EDCFieldName EnglishDesc
FieldType    alpha
EndField

BeginField
FieldID      3
EDCFieldName ActiveRet
FieldType    number
EndField

BeginField
FieldID      4
EDCFieldName SemiActiveRet
FieldType    number
EndField

BeginField
FieldID      5
EDCFieldName ActiveDisposal
FieldType    number
EndField

BeginField
FieldID      6
EDCFieldName SemiActiveDisposal
FieldType    number
EndField

BeginField
FieldID      9
EDCFieldName Active
FieldType    boolean
EndField

BeginField
FieldID      7
EDCFieldName LegalEval
FieldType    alpha
EndField

BeginField
FieldID      8
EDCFieldName FinancialEval
FieldType    alpha
EndField

EndTable
```

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Excel data file for the Business type importation:

CL	CLAIMS
MAR	MARINES
BO	BOAT
COMP	COMPUTER
TV	TELEVISION

Description file for the Business type importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\Import tests for manual\datafile.bus.type.xls
FieldsIDType Column
TableName Business Type

BeginField
FieldID 1
EDCFieldName Code
FieldType alpha
EndField

BeginField
FieldID 2
EDCFieldName Description
FieldType alpha
EndField

EndTable

Excel data file for the Building importation:

LA	Lasalle	+	5	1 haut de la chute	montreal	qc	J9P 4R7	Canada	Doctechno	514-123-4567	514-432-4567
VH	Van Horne	-	10	2 des jésuites	quebec	qc	J8P 4w7	Canada	Docufile	514-451-4437	514-442-4437

Description file for the Building importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\Import tests for manual\datafile.building.xls
FieldsIDType Column
TableName Buildings

BeginField
FieldID 1
EDCFieldName BuildingStr
FieldType alpha
EndField

BeginField

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```
FieldID     2
EDCFieldName Description
FieldType    alpha
EndField

BeginField
FieldID     3
EDCFieldName MultiTransitLocation
FieldType    boolean
EndField

BeginField
FieldID     4
EDCFieldName StatThresholdMins
FieldType    number
EndField

BeginField
FieldID     5
EDCFieldName AddrLine1
FieldType    alpha
EndField

BeginField
FieldID     6
EDCFieldName City
FieldType    alpha
EndField

BeginField
FieldID     7
EDCFieldName State
FieldType    alpha
EndField

BeginField
FieldID     8
EDCFieldName PostalCode
FieldType    alpha
EndField

BeginField
FieldID     9
EDCFieldName Country
FieldType    alpha
EndField

BeginField
FieldID     10
EDCFieldName ContactName
FieldType    alpha
EndField
```

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BeginField
FieldID 11
EDCFieldName ContactPhone
FieldType alpha
EndField

BeginField
FieldID 12
EDCFieldName ContactFax
FieldType alpha
EndField

EndTable

Data file for the Customer importation (In the Customer Information module):

"Docu p","P-001","201","12/07/2004","+","-","Roger Smith","23 Laurier","Quebec","QC","I0P 6Y8","Canada","418-305-0098","418-405-0098","Docuf@netsoft.ca","Demo F","Docuf@netsoft.ca","+","30","Regular","1","12","30","+","1","1","+","VH","HOS","-","12/07/2005","-","Daily","-","+","Container","10","-","-","2","2","1","Box","1","+","-","+","-","+","+","-","+","1.2","+","-","+","-","+","+","-","+","VH","+","-","+","-","+","+","5","+","6","-","+","-","+","-","+","+","+","-","+","11:00","14:00","Donald Rippley","418-324-0021","221","418-324-0022","Donald Rippley","418-324-0021","221","418-324-0022","+","+","+","+","Roger Smith","REGULAR","23 Laurier","+","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","-","-"

"Docu o","O-001","202","12/07/2004","+","-","John Keith","13 St-Laurent","Montreal","QC","K5P 6H5","Canada","514-978-7743","514-578-7743","Docug@netsoft.ca","Demo G","Docug@netsoft.ca","+","30","Department","7","6","150","-","7","0","+","CL","PUB","+","12/07/2005","+","Monthly","+","-","Delivery","12","+","+","2","2","0","Tape","0","-","+","-","+","-","-","+","-","0.1","-","+","-","+","-","-","+","-","RU","-","+","-","+","-","-","5","-","6","+","-","+","-","+","-","-","-","+","-","11:00","14:00","Mark Sawyer","514-872-0047","0","514-872-0045","Mark Sawyer","514-872-0047","0","514-872-0045","-","-","-","-","John Keith","0","13 St-Laurent","-","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","-","-"

Note: All the data is supposed to be on the same line in the file since the importation works by separation, but because of the book's format we had to show it this way.

Description file for the Customer importation:

BeginTable

FileType separated
DataFileName U:\data\Import tests for manual\datafile.custinfo7.txt
FieldsIDType Column
Separator ,
Delimiter"
TableName Customer

BeginField
FieldID 1
EDCFieldName Name
FieldType alpha

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```
EndField

BeginField
FieldID      2
EDCFieldName CustKey
FieldType    alpha
EndField

BeginField
FieldID      4
EDCFieldName CreationDate
FieldType    Date
DateMask     dd/mm/yyyy
Epoch        80
EndField

BeginField
FieldID      5
EDCFieldName Active
FieldType    boolean
EndField

BeginField
FieldID      6
EDCFieldName Locked
FieldType    boolean
EndField

BeginField
FieldID      7
EDCFieldName Salesperson
FieldType    alpha
EndField

BeginField
FieldID      8
EDCFieldName AddrLine1
FieldType    alpha
EndField

BeginField
FieldID      9
EDCFieldName City
FieldType    alpha
EndField

BeginField
FieldID      10
EDCFieldName State
FieldType    alpha
EndField

BeginField
```

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```
FieldID     11
EDCFieldName PostalCode
FieldType    alpha
EndField

BeginField
FieldID     12
EDCFieldName Country
FieldType    alpha
EndField

BeginField
FieldID     13
EDCFieldName Phone
FieldType    alpha
EndField

BeginField
FieldID     14
EDCFieldName Fax
FieldType    alpha
EndField

BeginField
FieldID     15
EDCFieldName Email
FieldType    alpha
EndField

BeginField
FieldID     16
EDCFieldName BillTo
FieldType    alpha
EndField

BeginField
FieldID     17
EDCFieldName AccountingEmail
FieldType    alpha
EndField

BeginField
FieldID     18
EDCFieldName AutoInvoice
FieldType    boolean
EndField

BeginField
FieldID     19
EDCFieldName  InvoiceNetDays
FieldType    number
EndField
```

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```
BeginField
FieldID     20
EDCFieldName BillingType
FieldType    alpha
EndField

BeginField
FieldID     21
EDCFieldName InvoiceStartMonth
FieldType    number
EndField

BeginField
FieldID     22
EDCFieldName InvoicesPerYear
FieldType    number
EndField

BeginField
FieldID     23
EDCFieldName MinimumCostPerMonth
FieldType    number
EndField

BeginField
FieldID     24
EDCFieldName SeparateRentInvoice
FieldType    boolean
EndField

BeginField
FieldID     25
EDCFieldName RentInvoiceStartMth
FieldType    number
EndField

BeginField
FieldID     26
EDCFieldName RentInvoicesPerYear
FieldType    number
EndField

BeginField
FieldID     27
EDCFieldName PageBreakDetailedInv
FieldType    boolean
EndField

BeginField
FieldID     28
EDCFieldName BillingBuilding
FieldType    alpha
EndField
```

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```
BeginField
FieldID      29
EDCFieldName BusinessType
FieldType    alpha
EndField

BeginField
FieldID      30
EDCFieldName Taxable
FieldType    boolean
EndField

BeginField
FieldID      31
EDCFieldName RenewalDate
FieldType    date
DateMask     dd/mm/yyyy
Epoch        80
EndField

BeginField
FieldID      32
EDCFieldName ChargeRentArrears
FieldType    boolean
EndField

BeginField
FieldID      33
EDCFieldName RentCalculation
FieldType    alpha
EndField

BeginField
FieldID      34
EDCFieldName NoRentCredit
FieldType    boolean
EndField

BeginField
FieldID      35
EDCFieldName BillFullMonthNewBox
FieldType    boolean
EndField

BeginField
FieldID      37
EDCFieldName HourlyRate
FieldType    number
EndField

BeginField
FieldID      38
```

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EDCFieldName NotPaperInvoice
FieldType boolean
EndField

BeginField
FieldID 39
EDCFieldName PDFInvoice
FieldType boolean
EndField

BeginField
FieldID 40
EDCFieldName DeliveryTime
FieldType number
EndField

BeginField
FieldID 41
EDCFieldName PickUpTime
FieldType number
EndField

BeginField
FieldID 42
EDCFieldName RetentionType
FieldType number
EndField

BeginField
FieldID 43
EDCFieldName ContainerType
FieldType alpha
EndField

BeginField
FieldID 44
EDCFieldName Language
FieldType number
EndField

BeginField
FieldID 45
EDCFieldName TypeBySubDept
FieldType boolean
EndField

BeginField
FieldID 46
EDCFieldName NonTrackWarning
FieldType boolean
EndField

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```
BeginField
FieldID     47
EDCFieldName DeliveryLabels
FieldType     boolean
EndField

BeginField
FieldID     48
EDCFieldName ForcePasswords
FieldType     boolean
EndField


BeginField
FieldID     49
EDCFieldName TypeIntegrity
FieldType     boolean
EndField

BeginField
FieldID     50
EDCFieldName RestrictionIntegrity
FieldType     boolean
EndField

BeginField
FieldID     51
EDCFieldName DeptIntegrity
FieldType     boolean
EndField

BeginField
FieldID     52
EDCFieldName DispDateIntegrity
FieldType     boolean
EndField

BeginField
FieldID     53
EDCFieldName DefaultBoxVolume
FieldType     number
EndField


BeginField
FieldID     54
EDCFieldName Replication
FieldType     boolean
EndField

BeginField
FieldID     55
EDCFieldName AutoInventoryFile
```

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```
FieldType     boolean
EndField

BeginField
FieldID     56
EDCFieldName OrderPreAddFiles
FieldType     boolean
EndField

BeginField
FieldID     57
EDCFieldName FileToBoxConversion
FieldType     boolean
EndField


BeginField
FieldID     58
EDCFieldName SuppressFileOutCards
FieldType     boolean
EndField

BeginField
FieldID     59
EDCFieldName OpenShelfOutCards
FieldType     boolean
EndField

BeginField
FieldID     60
EDCFieldName FileToSrchConversion
FieldType     boolean
EndField

BeginField
FieldID     61
EDCFieldName SealedBox
FieldType     boolean
EndField

BeginField
FieldID     62
EDCFieldName Building
FieldType     alpha
EndField

BeginField
FieldID     64
EDCFieldName UniqueCustFileNo
FieldType     boolean
EndField

BeginField
```

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```
FieldID     65
EDCFieldName TimeWithByDateOrder
FieldType    boolean
EndField

BeginField
FieldID     66
EDCFieldName NoOrderGrouping
FieldType     boolean
EndField

BeginField
FieldID     67
EDCFieldName TapeNumberChange
FieldType     boolean
EndField

BeginField
FieldID     68
EDCFieldName ImmediateDelivery
FieldType     boolean
EndField

BeginField
FieldID     69
EDCFieldName BoxNumberWidth
FieldType    number
EndField

BeginField
FieldID     70
EDCFieldName AutoBoxNumber
FieldType     boolean
EndField

BeginField
FieldID     71
EDCFieldName FileNumberWidth
FieldType     number
EndField

BeginField
FieldID     72
EDCFieldName AutoFileNumber
FieldType     boolean
EndField

FieldID     73
EDCFieldName NoFileInBoxTracking
FieldType     boolean
EndField

BeginField
```

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FieldID 74
EDCFieldName IDCardUsage
FieldType boolean
EndField

BeginField
FieldID 75
EDCFieldName DeliveryWithPDT
FieldType boolean
EndField

BeginField
FieldID 76
EDCFieldName VerifyItemsNotFound
FieldType boolean
EndField

BeginField
FieldID 77
EDCFieldName TruckValidation
FieldType boolean
EndField

BeginField
FieldID 78
EDCFieldName WebDeptFiltering
FieldType boolean
EndField

BeginField
FieldID 79
EDCFieldName FullTextSearch
FieldType boolean
EndField

BeginField
FieldID 80
EDCFieldName ExpectedReturnDates
FieldType boolean
EndField

BeginField
FieldID 81
EDCFieldName ReuseBoxesAfterDest
FieldType boolean
EndField

BeginField
FieldID 82
EDCFieldName MorningPickingTime
FieldType time

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```
TimeMask      hh/mm
EndField

BeginField
FieldID      83
EDCFieldName AfternoonPickingTime
FieldType     time
TimeMask      hh/mm
EndField

BeginField
FieldID      84
EDCFieldName ContactName0
FieldType     alpha
EndField

BeginField
FieldID      85
EDCFieldName ContactPhone0
FieldType     alpha
EndField


BeginField
FieldID      86
EDCFieldName ContactExt0
FieldType    alpha
EndField

BeginField
FieldID      87
EDCFieldName ContactFax0
FieldType     alpha
EndField

BeginField
FieldID      88
EDCFieldName ContactName1
FieldType     alpha
EndField

BeginField
FieldID      89
EDCFieldName ContactPhone1
FieldType     alpha
EndField

BeginField
FieldID      90
EDCFieldName ContactExt1
FieldType     alpha
EndField
```

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```
BeginField
FieldID     91
EDCFieldName ContactFax1
FieldType     alpha
EndField

BeginField
FieldID     92
EDCFieldName PrintDetailedInvoice
FieldType     boolean
EndField

BeginField
FieldID     93
EDCFieldName PrintDeliverySummary
FieldType     boolean
EndField


BeginField
FieldID     94
EDCFieldName PrintOutBoxes
FieldType     boolean
EndField

BeginField
FieldID     95
EDCFieldName PrintActivityReport
FieldType     boolean
EndField

BeginField
FieldID     96
EDCFieldName FastOrderRecipient
FieldType     alpha
EndField

BeginField
FieldID     99
EDCFieldName ScheduleOverride
FieldType     boolean
EndField

BeginField
FieldID     100
EDCFieldName OpenW_Monday
FieldType     boolean
EndField

BeginField
FieldID     101
EDCFieldName WStartTime_Monday
FieldType     Time
```

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```
TimeMask      hh/mm
EndField

BeginField
FieldID      102
EDCFieldName WEndTime_Monday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID      103
EDCFieldName OpenW_Tuesday
FieldType     boolean
EndField

BeginField
FieldID      104
EDCFieldName WStartTime_Tuesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID      105
EDCFieldName WEndTime_Tuesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID      106
EDCFieldName OpenW_Wednesday
FieldType     boolean
EndField

BeginField
FieldID      107
EDCFieldName WStartTime_Wednesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID      108
EDCFieldName WEndTime_Wednesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID      109
EDCFieldName OpenW_Thursday
```

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```
FieldType     boolean
EndField

BeginField
FieldID     110
EDCFieldName WStartTime_Thursday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     111
EDCFieldName WEndTime_Thursday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     112
EDCFieldName OpenW_Friday
FieldType     boolean
EndField

BeginField
FieldID     113
EDCFieldName WStartTime_Friday
FieldType     Time
TimeMask      hh/mm
EndField

BeginField
FieldID     114
EDCFieldName WEndTime_Friday
FieldType     Time
TimeMask      hh/mm
EndField

BeginField
FieldID     115
EDCFieldName OpenW_Saturday
FieldType     boolean
EndField

BeginField
FieldID     116
EDCFieldName OpenW_Sunday
FieldType     boolean
EndField
```

EndTable

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7.7 List of related applications

This is a list of applications used with EDC to perform specific tasks.

CLIENT INSTALLER : The Client Installer is an advanced distributed installation program which installs the EDC ActiveFile software for the client of a record center. In summary, the Client Installer performs the following actions: installs the EDC ActiveFile software, obtains the client's data from its record center and obtains trial license from DocuData.

CUSTWEB.EXE : This application runs at the record center, and allows a client to view/edit its inventory through the web.

DCLOCK32.EXE : This application is normally used when one needs to unlock locked sessions. A session is usually locked by the system when a computer crashes during an operation and the number of users has been exceeded when a new session is opened. Specific users (either at the record center or at a client's site) can have access to this program; to set up these users go in the Customer (for a client) or Management (for an employee) section -> User Group | Employee Group or Authorized user | Employee -> Edit -> Edit, add the "Access Management" module to their list of accessible modules.

Note: Often the session is not entirely locked, only one module cannot be accessed. In this case, one can unlock operations in the *System Information* module (see View and unlock locked operations 216).

DCSETP32.EXE: This application is used to run the DC.CFG file (this is the configuration file that points out the starting directories of EDC RC or EDC ActiveFile).

DIMP32.EXE : This application is used when one needs to update the dictionary used by EDC (this is specifically for the fields and the menus of the software). The data of the dictionary is stored in String.dat (in the data directory).

DOCU32.EXE: This is the main application that starts EDC RC.

EDCCLRPC.EXE: This is a server program used by EDC ActiveFile Web software.

EDCMONITOR.EXE: This application monitors the dispatcher program. It verifies if new changes were done in EDC and sends them to another program (specific to one of our clients).

EDCREP32.EXE : This application is used for the replication of data. It controls the start and end time of the different replication processes.

EDCREQIP.EXE : Only used on with EDC ActiveFile, this program is responsible for communicating and encrypting the data received. The program EDCREP32.EXE needs this program to do the replication between the RC and the customer.

EDCRPC.EXE : This application allows EDC programs as well as other programs to communicate with EDC.

EDCSER32.EXE : This application allows modem replication with the client server (this application is only useful when a modem is used).

EDCSERIP.EXE : This application communicates by IP over the network to send and receive files from a client server (this application is responsible for the replication with the client).

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EDCSHL32.EXE : This application launches other EDC programs. Usually the launcher runs the following programs: IMGSER32.EXE, EDCREP32.EXE, EDCREQIP.EXE.

IMGSER32.EXE: This application is an image server, that is used for digital imaging.

LICENS32.EXE: This program allows installing the license for the software. Works with both RC and Client version. For example, if the client wants to increase their number of users, or move from the SA to SAI version of the software, the license we give them will be entered in this program.

ORDCHECK.EXE : This application is responsible of informing you when the Order Monitor (ORDMON32.EXE**)** is not working.

ORDMON32.EXE : This application monitors incoming orders and notifies the record center's personnel when rush orders are entered.

RCKEYGEN.EXE: Program that must be executed only once at each record center. It will create random encryption
keys to allow secure replication between the record center and its clients.

REMO32.EXE: This is the main application that starts EDC ActiveFile.

THERMALPRINTSERVER.EXE: Program that allows configuring in DcSetp32.EXE a thermal printer that is installed on a specific machine identified by an IP address.

UPDATE.EXE: This application is used when updating the software.

7.8 Tables

This topic deals with the major tables used by EDC. This will be useful especially if you start working with more advanced reports.

Definition

A table is the basic unit of storage in a database management system. It represents entities and relationships, and consists of one or more units of information (rows), each of which contains the same kinds of values (columns). Each column is given a column name, a data type, and a width. The values found in the tables are the values found in the software.

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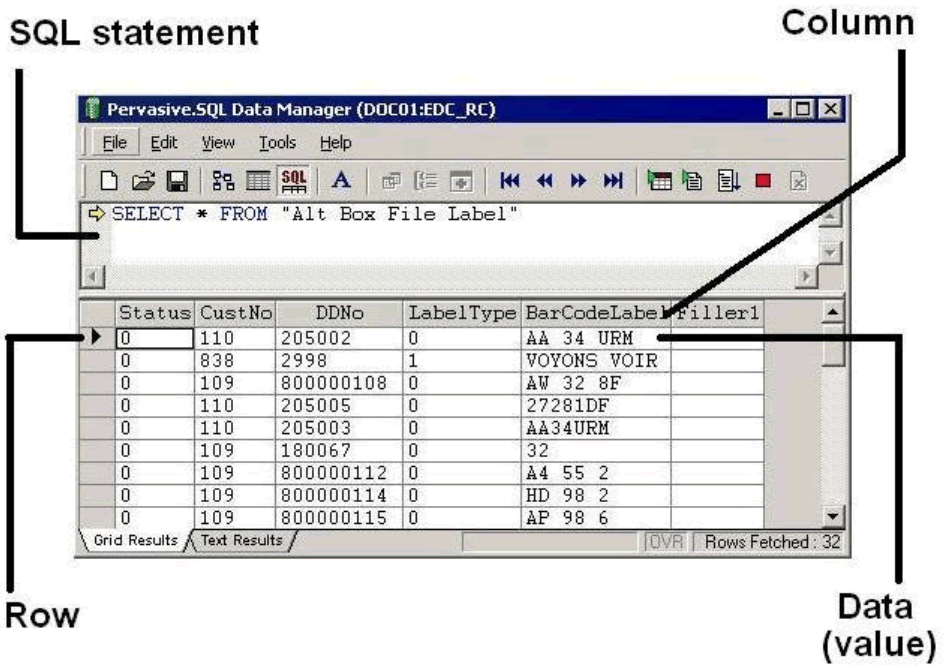
SQL statement
Column
Pervasive.SQL Data Manager (DOC01:EDC_RC)
File Edit View Tools Help
SELECT * FROM "Alt Box File Label"
Status CustNo DDNo LabelType BarCodeLabel Filler1
0 110 205002 0 AA 34 URM
0 838 2998 1 VOYONS VOIR
0 109 800000108 0 AW 32 8F
0 110 205005 0 27281DF
0 110 205003 0 AA34URM
0 109 180067 0 32
0 109 800000112 0 A4 55 2
0 109 800000114 0 HD 98 2
0 109 800000115 0 AP 98 6
Grid Results Text Results
OVR Rows Fetched: 32
Row
Data (value)

Description

Access_Error

Module: Authorized user, Employee

Description: This table logs the time, date, customer, and authorized user for unsuccessful logon attempts (incorrect passwords). If the number of unsuccessful logon attempts exceeds 10 within a 10 minute period, the user or employee's profile is made inactive until reset.

Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field. The value of this field is 0 if the access error is by an employee.

UserNo - EDC generated customer number, which can be see in the *Authorized User* module under the

Access_Log

Module: Access Log

Description: This table keeps track of all the sessions opened in EDC (user, date and time, etc.)

Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.

Site - Number given to a specific building

SessionNo - Automatic number given to each session opened in EDC

UserNo - EDC generated customer number, which can be see in the *Authorized User* module under the *System* field.

Active - Boolean FieldType (the values must be + or -) indicating if the session is active

StartDate - Date the session started

StartTime - Time the session started

EndDate - Date the session ended

EndTime - Time the session ended

Alt_Box_File_Label

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Module: Box or File
Description: This table stores the alternate labels (bar codes) of boxes and files. Alternate labels can be viewed or modified in the Box or File modules by clicking on **View|Edit -> Alternate label**.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box or file
LabelType - Box (0) and File (1)
BarCodeLabel - Alternate label

Alt_Space_Label
Module: Location
Description: This table stores the alternate labels (bar codes) of locations. Alternate labels can be viewed or modified in the *Location* module, in the *Alternate label* field.
Important Fields:

OldLocation - EDC generated location number
Location - Alternate location label

Box
Module: Box
Description: This table stores most of the information contained in the *Box* module.
Important Fields:

AccessLevel - Access level of the box
Activity - See the Activity Codes 662 topics
BoxDDNo - RC number of the box
BoxOwner - Owner of the box
CustBoxNo - Box number
Description - Description
DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 664 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
InVault - Boolean FieldType (the values must be + or -) specifying if the box is in the vault
Location - Box location
MainDeptNo - Department number given by the system
OldCustBoxNo - Old box number
RangeFrom - Range from field
RangeTo - Range to field
SourceLoc - Source location field
StartDate - Start Date
SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
UserField4 - Field 4
UserField5 - Field 5
UserField6 - Field 6
WithdrawalDate - Withdrawal date

Box_History

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Module: Box
Description: This table stores all the information viewable in the *Box* module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 662 topic.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the box
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

Box_Internal _Memo
Module: Internal Note
Description: This table stores the information contained in the *Internal Note* module, when clicking on **File -> Internal Notes -> Box**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Memo
Module: Box
Description: This table stores the information viewable in the *Box* module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Memo_2
Module: Box
Description: This table stores the information viewable in the *Box* module, when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Return_Date
Module: Orders and Box
Description: This table stores the information that is entered when specifying a return date when creating an order (the return date can be viewed beside the "State" field of the *Box* module). This is

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only used when the "Use expected return dates" 238 field from the *Customer Information* module is set to *Yes*.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box
ReturnDate - Return date given to the box when entering an order. The Return Date 238 option can be activated in the *Customer Information* module.
OrderNo - Order number

Buildings
Module: Building
Description: This table stores the information viewable in the *Building* module.
Important Fields:

BuildingNo - EDC generated building number.
BuildingStr - This is the abbreviation used throughout the software for that specific building.
Description - This is the description of the building that was entered in the description field.
AddrLine1 - Building address
AddrLine2 - Building address
City - City
State - State
PostalCode - PostalCode
Country - Country
ContactName - Name
ContactPhoneNo - Phone number
ContactFax - Fax
ContactPhoneExt - Phone extension
StatThresholdMins - Statistic threshold 187
MultiTransitLocation - Boolean FieldType (the values must be + or -) specifying if the building has multiple transit locations

Business Type
Module: Business Type
Description: This table stores all the information viewable in the *Business Type* module.
Important Fields:

Code - Business type code
Description - Business type description

Customer
Module: Customer Information
Description: This table stores the information viewable in the *Customer Information* module.
Important Fields:

CustKey - Key assigned to each customer at their creation.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.

Cust_Document_Memo
Module: Retention schedule
Description: This table stores the information viewable in the *Retention Schedule* module, when

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pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the DocTypeNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Cust_Document_Type
Module: Retention Schedule
Description: This table stores all the information viewable in the *Retention Schedule* module.
Important Fields:

Active - Boolean FieldType (the values must be + or -) indicating if the document type is active
ActiveDisposal - See the Activity Codes 664 topic
ActiveRet - Active retention period (in months)
*AutoIndexBoxes - Boolean FieldType (the values must be + or -) indicating if the boxes will be indexed automatically
*AutoIndexFiles - Boolean FieldType (the values must be + or -) indicating if the files will be indexed automatically
*AutoIndexImages - Boolean FieldType (the values must be + or -) indicating if the images will be indexed automatically
Classified - Boolean FieldType (the values must be + or -) indicating if the document type is classified
Code - Document type code
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DocTypeNo - EDC generated number assigned to each document type
EnglishDesc - English description
FinancialEval - Financial Evaluation field
FrenchDesc - French Description
LegalEval - Legal Evaluation field
MainDeptNo - EDC generated number assigned to each department
OcrTemplateNo - EDC generated number assigned to each OCR template (these templates are only available when a customer is replicated with the Record Center).
SemiActiveDisposal - See the Activity Codes 664 topic
SemiActiveRet - Semi-active retention period (in months)
SubDeptNo - EDC generated number assigned to each sub-department

Cust_Source_Loc
Module: Source Location
Description: This table stores all the information viewable in the *Source Location* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Location - Location name
AddrLine1 - First line of the location's address
AddrLine2 - Second line of the location's address
City - City
State - State
PostalCode - Postal Code

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Country - Country
PhoneNo0 - Phone number

Customer_Holiday
Module: Customer Holiday
Description: This table stores all the information viewable in the *Customer Holiday* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
HolidayDate - Date of the holiday
Description - Description

Customer_Price
Module: Customer Pricing
Description: This table stores all the information viewable in the *Customer Pricing* module.
Important Fields:

TaxCalculation - See the Activity codes 667 topic
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
PriceCode - Price code
RateByTime - Time
UnitType - See the Activity codes 667 topic
Rate - Rate
Break - Price break (see the Activity codes 667 topic)
Description - New description

Customer_User
Module: Authorized User
Description: This table stores all the information viewable in the *Authorized User* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated user number which can be seen in the current module under the *System* field.
FirstName - First name
LastName - Last name
MiddleInitial - Middle initial
PhoneNo - Phone number
Language - Default language (English = 0, French = 1)
ForcePassword - Boolean FieldType (the values must be + or -)
Active - Boolean FieldType (the values must be + or -)
Password expires - Boolean FieldType (the values must be + or -)
LastPasswordChange - Date entered by the system to keep track of the changes
ExpireAfterDays - Password expiration
ChangePassNextLogon - Boolean FieldType (the values must be + or -)
LoginName - Login name
EmailAddress - Email address
WorkingDirectory - Working directory
PhoneExt - Phone extension

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Del_Address_Memo
Module: Delivery Address
Description: This table stores the information viewable in the *Delivery Address* module, when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the DelAddrNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Deleted_Order_Item
Module: Deleted Order
Description: This table stores all the information viewable in the *Deleted Order* module.
Important Fields:

ItemType - (Box = 1, File = 2)
OrderNo - Order number
PriceCode - Price code that was not charged
Deleter - Person that deleted the order
DDNo - RC number of the item
Description - Description
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DeletedDate - Date of the deletion
DeletedTime - Time of the deletion

Delivery
Module: Delivery verification
Description: This table stores all the information viewable in the *Delivery Verification* module.
Important Fields:

DeliveryNo - Delivery number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
QuantityShipped - Quantity of items shipped
QuantityReturned - Quantity of items returned
DeliveryDate - Date of the delivery
State - See the Activity codes 664 topic
RouteNo - Route number
Building - Building
CheckInDate - Arrival date
CheckInTime - Arrival time
CheckOutDate - Departure date
CheckOutTime - Departure time
DeliveredByEmpNo - Refers to the EmployeeNo of the person that delivered the items
ServiceOnlyBilled - Indicates if the delivery was only billed for service (and not for rent).

Delivery_Address
Module: Delivery Address
Description: This table stores all the information viewable in the *Delivery Address* module.

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Important Fields:

DelAddrNo - EDC generated number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
AddrLine1 - First line of the address
AddrLine2 - Second line of the address
City - City
State - State or province
PostalCode - Postal code
Country - Country
ContactName - Name
ContactPhoneNo - Phone number
ContactFax - Fax
ContactPhoneExt - Phone extension
PercentSurcharge - Percent surcharge
Active - Boolean FieldType (the values must be + or -)
NoChargeRegDelivery - Boolean FieldType (the values must be + or -)
DailyReturn - Boolean FieldType (the values must be + or -)
DailyReturnQuty - Daily return quantity

Delivery_History
Module: Delivery Verification
Description: This table stores the information viewable in the *Delivery Verification* module, when clicking on **View -> History**.
Important Fields:

Activity - See the Activity Codes 664 topic
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - Refers to the DeliveryNo
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

Delivery_Route
Module: Delivery Route
Description: This table stores most of the information viewable in the fields from the *Delivery Route* module.
Important Fields:

EmployeeNo - EDC generated employee number, which can be seen in the *Employee* module under the *Number* field.
RouteNo - Route number
StartDate - Date
StartTime - Time
State - See Activity Codes 666 topic
VehicleNo - EDC generated vehicle number

Delivery_Route_Stop
Module: Delivery Route
Description: This table stores the information viewable in the main window of the *Delivery Route* module.

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Important Fields:

ArrivalTime - Arrival time
DeliveryNo - Delivery number
DepartureTime - Departure time
Position - Position in the window
RouteNo - Route number

Delivery_Type
Module: Delivery Type
Description: This table stores all the information viewable in the *Delivery Type* module.
Important Fields:

BRETPriceCode - Box return price code
Courier - See the Activity Codes 666 topic
DeliveryTime - Time
DeliveryTypeNo - EDC generated delivery type number
EnglishDesc - English description
FrenchDesc - French description
FRETPriceCode - File return price code
Ordering - Ordering
PriceCode - Price code
ShipMode - See the Activity Codes 666 topic
SurchargePriceCode - Surcharge price code

Department
Module: Department
Description: This table stores most of the information viewable in the *Department* module.
Important Fields:

Coordinator - Coordinator
CoordinatorAddr - Address of the coordinator
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Description - Department description
MainDeptName - Name
MainDeptNo - EDC generated department number
Supervisor - Supervisor
SupervisorAddr - Address of the supervisor

Employee
Module: Employee
Description: This table stores most of the information viewable in the *Employee* module.
Important Fields:

AddrLine1 - First line of the address
AddrLine2 - Second line of the address
AddrLine3 - Third line of the address
BirthDay - Birth day
ChangePassNextLogon - Boolean FieldType (the values must be + or -)
City - City
Country - Country
EmployeeNo - EDC generated employee number

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ExpireAfterDays - Number of days before the password expires
FirstDay - First date of the Duration field
FirstName - First Name
ForcePassword - Boolean FieldType (the values must be + or -)
Language - Default language (English = 0, French = 1)
LastDay - Second date of the duration field
LastPasswordChange - Date entered by the system to keep track of the changes
LoginName - Login name
MiddleInitial - Middle initial
PasswordExpires - Password expiration
PhoneNo0 - Phone number
PositionLine1 - Position field
PositionLine2 - Position field
PostalCode - Postal code
State - State or province

Employee_Group
Module: Employee Group
Description: This table stores most of the information viewable in the *Employee Group* module.
Important Fields:

GroupNo - EDC generated group number
Name - Group name

Employee_Statistics
Description: This table keeps track of most of the operations performed by employees.
Important Fields:
Building - Building
EmployeeNo - EDC generated employee number
EndDate - End date of the action
EndTime - End time of the action
ItemType - See the Activity codes 665 topic
MistakeCount - Number of mistakes in total
MistakePerHour - Average of mistakes per hour
OperationType - See the Activity codes 665 topic
StartDate - Start date of the action
StartTime - Start time of the action
SuccessCount - Number of successes
SuccessPerHour - Average of successes per hour

Folder
Module: File
Description: This table stores most of the information contained in the *File* module.
Important Fields:

AccessLevel - Access level of the file
Activity - See the Activity Codes 662 topics
BoxDDNo - RC number of the box
CustBoxNo - Box number
CustFileNo - File number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Description - Description

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DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 664 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
EntryDate - Entry date
FileDDNo - RC number of the file
FileOwner - File owner
MainDeptNo - Department number given by the system
OldCustFileNo - Old file number
RangeFrom - Range from field
RangeTo - Range to field
ShelfLocationNo - EDC generated shelf location number, which can be seen in the *Shelf location* module under the *System* field.
SourceLoc - Source location
StartDate - Start Date
SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
WithdrawalDate - Withdrawal date

File_History
Module: File
Description: This table stores all the information viewable in the *File* module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 662 topic.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the file
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

File_Internal_Memo
Module: Internal Note
Description: This table stores the information contained in the *Internal Note* module, when clicking on **File -> Internal Notes -> File**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Memo
Module: File
Description: This table stores the information viewable in the *File* module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

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ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Memo_2
Module: File
Description: This table stores the information viewable in the *File* module, when pressing on **F4** or when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Return_Date
Module: File
Description: This table stores the information that is entered when specifying a return date when creating an order (the return date can be viewed beside the "State" field of the *File* module). This is only used when the "Use expected return dates" 238 field from the *Customer Information* module is set to *Yes*.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the box or file
ItemNo - EDC generated number.
OrderNo - Order number.
ReturnDate - Return date that was entered when creating the order.

Holiday
Module: Holiday
Description: This table stores all the information viewable in the *Holiday* module
Important Fields:

Description - Description given to the holiday
HolidayDate - Date of the holiday

List
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

ListDDNo - EDC generated list number
Description - List description
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated authorized number
DestDate - Destruction date

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ApprovedDate - Date the list was approved
ListType - See the Activity Codes 666 topic
DestType - See the Activity Codes 664 topic
CustListNo - List number viewable in the module
DeliveryNo - Number of the deliveries assigned to the list
OnPalletList - If the box is check off it means that the list has one or many pallets assigned to it.

List_Item
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

ListDDNo - EDC generated list number
ItemType - See the Activity Codes 665 topic
DDNo - RC number of the item
CustItemNo - Customer number of the item
MainDept - Main department of the item
SubDept - Sub-department of the item
PickState - See the Activity Codes 666 topic
Volume - Volume of the item
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DocTypeCode - Document type code viewable in the *Retention schedule* module under the *Type* field
Location - Location of the item

Orders
Module: Order
Description: This table stores part of the information viewable in the *Order* module
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DelAddrNo - EDC generated delivery address number
DeliveryDate - Delivery date
DeliveryNo - Delivery number
DeliveryTime - Delivery time
DeliveryTypeNo - EDC generated delivery address number
EntryDate - Entry date
EntryTime - Entry time
FastOrder - Boolean FieldType (the values must be + or -)
OrderNo - Order number
State - See the Activity Codes 664 topics
Taker - Employee name
UserNo - EDC generated user number, which can be seen in the *Authorized User* module under the *System* field.

Order_Item
Module: Order
Description: This table stores part of the information viewable in the *Order* module
Important Fields:

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ChargeCode - Charge code associated with the item
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the ordered item (it can be a box or a file)
DeliveryNo - Delivery number
ItemNo - Item number (position on the list)
ItemType - (Line Item = 0, Box = 1, File = 2)
ListDDNo - List number (this makes reference to a Disposal, a Transfer or a Deletion list)
OrderNo - Order number
PermanentlyOut - Boolean FieldType (the values must be + or -)
Pickable - Boolean FieldType (the values must be + or -)
PriceCode - Price code
Quantity - Quantity of each item
Recipient - Recipient

Pallet_Item
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

PalletNo - EDC generated pallet number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
BoxDDNo - Box RC number
Location - Box location
ListDDNo - EDC generated list number
ItemType - See the Activity Codes 665 topic

Pallet_List
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

PalletNo - EDC generated pallet number
CreationDate - Creation date of the list
State - See the Activity codes 666 topic
ListType - See the Activity Codes 666 topic
DestType - See the Activity Codes 664 topic
BoxTypeNo - EDC generated box type number

Price
Module: General Pricing
Description: This table stores part of the information viewable in the *General Pricing* module
Important Fields:

Break - Price break (see the Activity codes 667 topic)
EnglishDesc - English description
FrenchDesc - French description
GLCodeForBoxes - Exportation code for boxes
GLCodeForTapes - Exportation code for tapes

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MinQty - Minimum quantity
OrderMin - Order minimum
PriceCode - Price code
Rate - Rate
RateByTime - Time
Stock - Left in stock
TaxCalculation - See the Activity codes 667 topic
UnitType - See the Activity codes 667 topic

Return_Item
Module: None
Description: This table stores the information concerning all the return items for each delivery.
Important Fields:

BoxSized - Boolean FieldType (the values must be + or -)
Building - Building the item was returned to
ChargeCode - Charge code
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - Item's RC number
DeliveryNo - Delivery number
FilesScanned - Boolean FieldType (the values must be + or -)
FileDesc - File description
ItemType - See the Activity Codes 665 topic
OrderNo - Order number
PriceCode - Price code associated to each item
Quantity - Quantity returned
TransitLocationNo - EDC generated transit location number

Shelf_Location
Module: Shelf Location
Description: This table stores the information viewable in the *Shelf Location* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Description - Description
Location - Location
LocationNo - EDC generated customer number, which can be seen in the *Shelf Location* module under the *System* field.
MediaType - Media type
OccupationDate - Date the location was first occupied
RangeFrom - Range from
RangeTo - Range to
TotalQuantity - Linear feet available for storage

Space
Module: Location
Description: This table stores the information viewable in the *Location* module.
Important Fields:

Accept all sizes - Boolean FieldType (the values must be + or -)
Capacity - Capacity

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ExclusiveCustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field. In this case the location will be exclusive to the customer corresponding to the number entered.
Holding - Boolean FieldType (the values must be + or -)
InUnits - Number of items in the IN state
Location - Location
MainDeptNo - EDC generated department number. This field only applies if the field ExclusiveCustNo is filled.
OutUnits - Number of items in the OUT state
PriceCode - Price code associated to the location.
Tape - Boolean FieldType (the values must be + or -)
UnitSize - Unit size
Used - Number of spaces used
Vault - Boolean FieldType (the values must be + or -)

Sub_department
Module: Department
Description: This table stores the information viewable in the *Department* module, when one edits or adds a sub-department.
Important Fields:

SubDeptNo - EDC generated sub-department number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
MainDeptName - Main department name
SubDeptName - Sub-department name
RetentionYears - Retention years
MainDeptNo - EDC generated department number
Active - If the box is checked, then the sub-department is active
Description - Description

Transit_Locations
Module: Building
Description: This table stores the information viewable in the *Building* module, in the "Transit location" list.
Important Fields:

BuildingNo - EDC generated building number
Description - Description
Location - Location
TransitLocationNo - EDC generated location number

User_Group
Module: User Group
Description: This table stores part of the information viewable in the *User Group* module
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
GroupNo - EDC generated group number
Name - Group name

Note: When the values are of the boolean type, "+" means *Yes* and "-" means *No*.

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7.9 Exporting an EDC report into Excel

This procedure applies to any report that is available in the modules, when pressing on the **File -> View report** menu item.

1. Export the report in the txt format (save it)
2. Go in Excel. Click on **File -> Open**
3. Select "Text files (*.prn; *.txt; *.csv)" in the *Files of type* field
4. Click on the **Open** button.
5. Select the "Fixed width" option
6. Click on the **Next** button
7. Edit the column breaks as shown.
8. Choose the data column format (if necessary) or leave it as it is and press on the **Finish** button
9. The report should be exported correctly.

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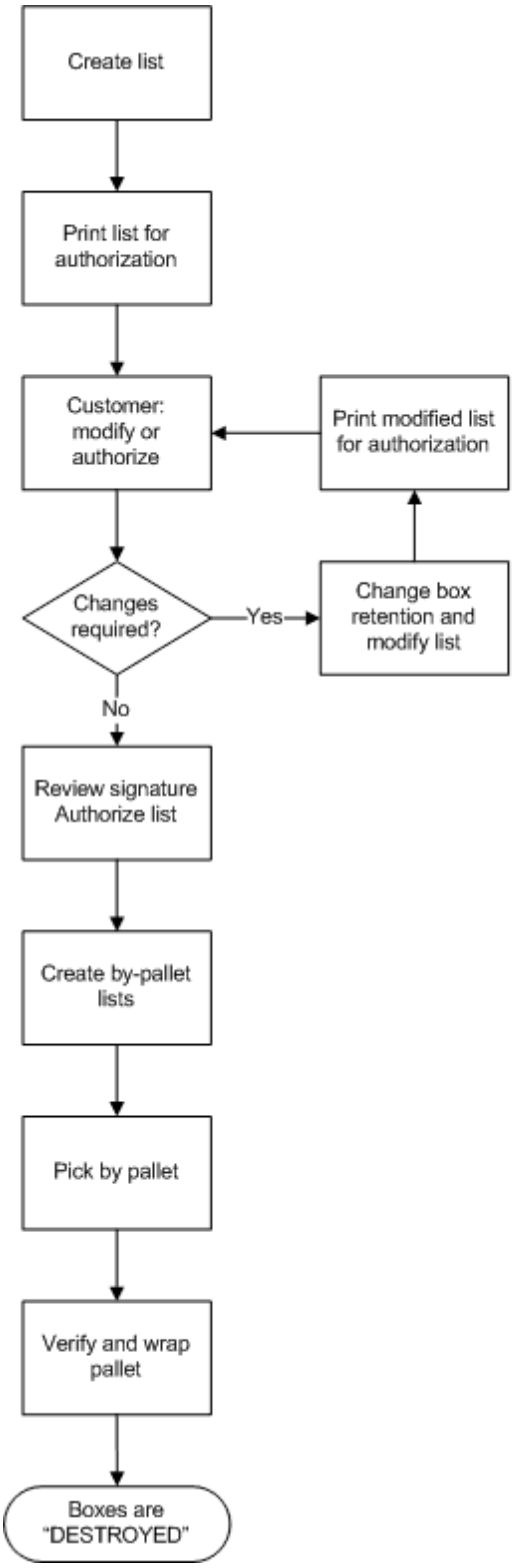
7.10 Disposal list workflow



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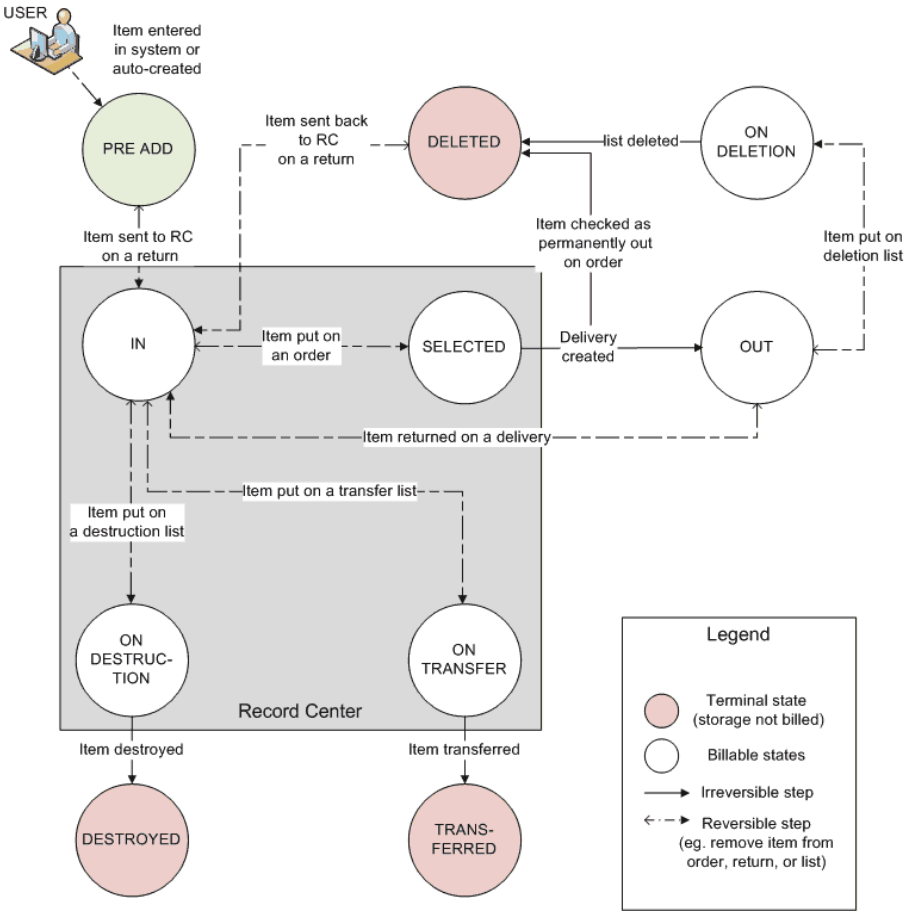
7.11 Item states



8 Glossary

8.1 Definitions

Access level
Setting an access level greater than 0 on a box or file limits access to that file to users with a greater or equal access level assigned in their authorized user profile.

Alternate bar code
A barcode generated by an external system but linked in EDC to the box, file, or location, so that it can still be recognized.

Auto Inventoried file
Files created during the order process will become permanent if they are found. If they are not found, the record of the file is keep in the deleted order items 573 module rather than in the inventory. Depending on the customers settings 234, a search charge may be automatically applied instead of a picking fee.

Box Bar Code
Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by a bar code scanner, for data entry and tracking purposes.

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Interpretation of a box barcode:

1 : Box code (2 = file, 8 = file out card, 11 = location...)
Q: Check digit (A letter calculated based on the sum of the values of the other characters, validates that the entire barcode was read.)
838 : Customer System Number 225 (which can be seen in the Customer Information module)
6343 : Box RC number 732 (which can be seen in the Box module)

*** See also Tape Bar Code

Customer key (company key)
Unique series of numbers and letters which identify an organization within EDC.

Conservation policy
Determines if the boxes' or files' disposal dates are calculated from their related department or document type. The most common policy is to compute the disposal date by document type.

CSV
Abbreviation meaning Coma Separated Value. This file format is used as a representation of a database. Each line is one entry or record; the fields in the record are separated by commas. This format is often used to import data.

Deletion list (cancellation of space)
List of OUT semi-active boxes and files which are to be no longer considered part of the record center's inventory (effectively cancelling the space for billing purposes).

Delivery types
The different delivery services offered by your off site record center.

Disposal list
List of boxes which includes all documents with an expired disposal date. The destruction of the articles present on the list must be confirmed before the operation can be executed. The disposal mode of the document's type will establish in what manner the boxes will be disposed of.

Disposal
Action that will be applied to a document at the end of its retention period.

Disposal, CONFIDENTIAL
Documents of this mode will be disposed of in a confidential manner.

Disposal, mode of
Manner with which a document will be disposed of. The disposal modes are controlled by the document types.

Disposal, NON CONFIDENTIAL
Documents of this mode will not be disposed of in a confidential manner.

Disposal, NONE
You have not yet determined a disposal mode.

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Disposal, PERMANENT
Documents of this mode will not be disposed of.

Disposal, REVISION
Documents of this mode will be placed on a list so that they can go through a special verification before being disposed of.

Disposal, SAMPLE
Documents of this mode will be placed on a list so that it will be possible to extract samples and dispose of the remaining items.

Disposal, SEND TO DEPOT
Two possibilities :
1. The active documents of this mode will be transformed into semi-active documents and sent to your storage facility.
2. Semi-active documents of this mode will generally be sent to your permanent archiving facility.

Document, active
Usually, this is a document that is being accessed frequently. Active documents are generally kept within an organization's storage facility, not at an off site records center.

Document, semi-active
A document that is not being accessed frequently. Hence, it is cost efficient to conserve semi-active documents at an off site record center.

Fields
Reserved zone of an entry form that can contain a specific information, like an entry date or a box description.

Fields, alphanumeric and numeric
The most common. Simply type in the required information in the field. A numeric field can contain only numbers, while an alphanumeric field can contain both numbers and letters.

Fields, choice field
Only a limited set of choices may be entered in the field. Press the space bar or click at the right of the field to select the next possible value.

Fields, drop down
These fields are like numeric and alphanumeric fields, but only values located in a list can be entered in the field. You have access to a pop-up list of the valid values by clicking a button located at the right of the field.

Fields, optional
Field that can remain empty.

Fields, required
Field that must be filled in. An entry form can only be confirmed if all required fields are not blank. Required fields frequently appear in red.

Fields, unique
Field on an entry form which cannot have duplicate values. For example, the system will not permit the addition of a new box that has the same number as a box already in the inventory (this is only

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by customer.)

File Bar Code

2L 838 3124

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies every file with a bar code label to ensure accuracy when files enter and leave the off-site record center.

Legend
2 : File code
L: Check digit (could be any other letter)
838 : Customer System Number 225 (which can be seen in the Customer Information module)
3214 : File RC number 732 (which can be seen in the File module)

History
History of the activities of a box or file.

Holding location
A holding location is usually a temporary location where the boxes wait until they are put in their final locations. It is different from a transit location in the fact that the boxes have been assigned a size (this is used to start charging the storage of a box as soon as it is added to the inventory.)

Index
Fields by which a list or report will be sorted, scanned or searched.

Item set
Drop-down field associated to a list defined in the Box and the File module.
This field allows to associate an item to an item set. When one item associated to an item set is ordered, all the available items associated to that set are automatically ordered by the system.
To associate an item to an item set, simply select an item set in the drop-down list or add a new set manually by entering a description.

Location Bar Code

11C VH-9-0104-45

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies each location with a bar code label to ensure accuracy when files and boxes are checked in and out of their respective locations.

Legend

11 : Location code
C: Check digit (could be any other letter)
VH-9-0104-45 : Location (which corresponds to the location mask specified in the System Information module)

** See also the Location mask 202 topic for more details

Mask

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When a field has a mask, you must enter the information according to the criteria defined by the mask. Most masks are defined in the Customer Information module.

Mask criteria
Regular mask
- "X" any character
- "!" any character, forced to upper case
- "L" any character, forced to lower case
- "x" any character, first letter of a word forced to upper case
- "a" alphas and "-" and "," and "."
- "A" alphas and "-" and "," and ".", forced to upper case
- "l" alphas and "-" and "," and ".", forced to lower case
- "1" numbers only, no spaces
- "9" numbers and spaces only
- "i" numbers and spaces and "-"
- "#" numbers and spaces and "-" and "."

Example : A field with the mask "999" will accept the following values (of three characters): "345", " 84" and "0 0". It will not accept the following values: "4-6", "4.6", "4,6", "ert", "er4" and "E-4"

Date mask

Value	Result
"mm/dd/yyyy"	"01/09/1998"
"yyyy/mm/dd"	"1998/01/09"

Menu
List of words, generally located on the top of the screen, that gives access to menu items. A menu item may either execute an operation or open another menu, called a sub-menu.

Menu item
Choice of operations offered within a menu. The menu item may either execute an operation, or open a new sub menu with its own menu items. See also "menu".

Module
EDC is composed of multiple modules accessible from the Main Window of the system. Each module is responsible for a specific set of operations. For example, the Box module is used to add, edit, print, and search for boxes.

Non-track file
These are files that have not been inventoried on the computer system. You may still order non-track files, but the system will record only the description of the file when it is ordered. Therefore the tracking on non-track files is limited, but it is still possible to order at a file level.

OCR
Optical Character Recognition. A technology that lets one convert an imaged document to editable text.

Online help
Information on the software that is available within the software itself. Pressing F1 will display a help screen on the current operation in a module.

Password
Combination of letters, numbers, or other characters used to confirm the identity of a company or

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user. Passwords must be kept secret at all times to ensure confidentiality. It is also recommended to change passwords on a regular basis.

PDT
PDT is the abbreviation for Portable Data Terminal (bar code reader). This abbreviation will be used through the manual to describe all the portable bar code readers supported by EDC (PHL 2700 and PDT 3100).

PDT 3100
Portable data terminal manufactured by Symbol.
Features:
- Memory: Up to 7.6 MB for data and/or program storage
- Weight: 440 to 480 g - with battery and laser module
- Keypad: 21-key hard key cap ; 35-key or 46-key conductive rubber. Side alpha-shift key and scan trigger.
- Drop Test: 4 feet from concrete
- Dimensions: 1.9 x 3 x 9.38 in.
- Warranty : approximately a year after date of purchase
- Operating time: approximately 8 hours
- Back light option
- Supports portable printer (O'Neil model)

PHL 2700-80
Portable laser data collection terminal manufactured by Opticon.
Features:
- Memory: 8MB data RAM
- Weight: 177 g - excluding batteries
- Keypad: 27 keys total (26 keys user definable)
- Drop Test: 4 feet to concrete floor; 10 drops (all sides)
- Dimensions: 7 x 2.5 x 1.6 in.
- Scan Rate: 100 scans/sec.
- Warranty : 1 year from date of purchase
- Protects data for up to 30 days
- Operating time: approximately 40 hours
- Supports portable printer (O'Neil model)

RC number
RC is shorthand for Record Center. Every box and file is identified with a unique numerical RC number. This number is used with bar code labels to ensure accuracy when the boxes and files are manipulated internally by the system.

***Reactivation**
You can remove a semi-active document from the record center by deleting it. The information of the document in question is not erased from the database, it is only marked as deleted. You can return a previously deleted document to your record center by reactivating it, doing this will also reactivate its past history. See also the topic

Recipient
Person to whom an order is addressed. The authorized user is different from the recipient, because he is the one having access to EDC and can order for several recipients.

Record
All fields of a specific item such as, for example, the information of box "231".

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Record centre, off site
Storage facility where your less active (semi-active) documents are stored. A record center allows you to preserve your office space for more frequently used documents.

Replication
Replication is the process of synchronizing the data between a record center and its customers. The EDC Replicator (located at an EDC ActiveFile site) controls the replication requests. The schedule of the requests can be customized from within the program. Once the replication request has been initiated, a program called EDC Requester (located at an EDC ActiveFile site) encrypts and transfers the data to the record center. It will also perform the opposite operation when an answer is received from the record center : it will receive the data and decrypt it. All the replication requests are initiated from the client, the record center will never, under any circumstances, initiate a link with its clients. The communication is done through a TCP/IP link using the Internet. The record center must be running an EDC Replication Server process in order to accept the remote client requests. An EDC Replication Server process does not need to be installed if the record center does not have any customers using EDC ActiveFile or ActiveWeb.

Restrictions
Conditions you define that prevent the disposal of documents containing the restriction. Restrictions are associated to document types and are used to ensure the conservation of certain documents beyond their normal retention period.

Retention period
Period for which documents must be conserved for either legal, fiscal or company policy reasons.

Retention schedule
Collection of document types controlling the disposal of boxes and files. Types define the retention period and the disposal mode of documents.

Retention, active
Retention period of a document within an organization's storage facility. This period is defined from the time a document is created in the system to the time the document is transferred to semi-active storage at an off site center.

Retention, semi-active
Retention period of a document within an off site record center. This period is defined from the time a document enters an off site record center to the time the document is disposed of. See also "conservation policy".

***Session, suspended**
After a computer failure, an active session at that time will remain active even if it is not anymore. You should terminate any suspended session after making sure that the session is really inactive. When all your user licenses are used up by suspended sessions (preventing you from having access to EDC), you can use the Access Management program to terminate all suspended sessions. See list of related applications.

Shortcut, keyboard
Combination of one or more keys on the computer keyboard to be pressed simultaneously. Also known as hot keys, they enable you to perform operations more efficiently without having to use the menu or the mouse.

Signing officer

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Person with the authority to approve the destruction lists.

Sorting
When viewing a listing indexed by box numbers, the numbers will be sorted like a dictionary. Here is a sample list of sorted box numbers: 00001, 00002, 03, 09, 10, 100, 11, 20, 9, A-001, B-002, a-001, b-001. It is important to note that the box number 100 is before the number 11 and that all uppercase letters appear before lowercase letters. If your box numbering system is strictly numerical, then it is important to left pad with "0"s your numbers like 000001, 000002, 000022, ...

SQL Statement
A complete phrase in SQL that begins with a keyword; it describes an action to be taken in the tables 735 selected in the statement.

State, DELETED
The item has been deleted (which implies that the space for the item is cancelled, and will not be billed for). Boxes are generally deleted because they will not be returning to the off site center.

Note that deleted semi-active items are not deleted from the computer system; they are only marked as "DELETED", it is therefore possible to recover the history of deleted items by reactivating them.

State, DESTROYED
The item has been destroyed.

State, IN
The item is at the record center and is available for ordering.

State, IN (IN-HOUSE)
The item is present within your in-house inventory (active documents) and is available for ordering.

State, ON DELETION
The item is on a deletion (cancellation of space) list. After the item is processed, its state will change to "DELETED".

State, ON DESTRUCTION
The item is on a destruction list at your record center. After destruction of the item, its state will change to "DESTROYED".

State, ON TRANSFER
The item is on a transfer list. After the transfer, its state will change to "TRANSFERRED".

State, OUT
The item has been ordered from the record center and has not been returned.

State, PRE ADD
The item has been entered in the computer's inventory, but the item has not been received at the off site record center. The rent charges for items in PRE ADD are not billed. Once the items arrive at the off site center, their state is changed to "IN", and rent charges begin to take effect.

State, SELECTED
The item is currently selected for an order, but has not yet been shipped.

State, TRANSFERRED

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The item has been transferred to another storage center.

***Table**
A table is the basic unit of storage in a database management system. It represents entities and relationships, and consists of one or more units of information (rows), each of which contains the same kinds of values (columns). Each column is given a column name, a data type, and a width. The values found in the tables are the values found in the software.

Tape Bar Code

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies every tape with a bar code label to ensure accuracy when tapes enter and leave the off-site record center.

This type of bar code is a base 36, which means that 1 is 1 but 10 would become A. Example, the following bar code '1 13 10' would become '1 D A' if it were a tape. This type of coding is used so that the tape bar code sizes are minimized as much as possible.

Transfer list
List of boxes which are to be transferred from an off-site record center to another location.

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